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WORKFORCE INVESTMENT SAN FRANCISCO

AGENDAS AND MINUTES

2001 – 2003

(Minutes are available for very few of these meetings.)

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Workforce Investment San Francisco
Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

Date:	Wednesday, September 12, 2001
Time:	9:30 a.m. – 11:30 a.m.
Location:	Yerba Buena Center for the Arts Center for the Arts Theatre 700 Howard Street San Francisco CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

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Sunshine Ordinance Task Force
City Hall, Room 244
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San Francisco, CA 94102-4683
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In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: Monday, August 27, 2001

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Proposed Agenda

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes for June 13, 2001 *(Action Item)**
3. Public Testimony will be taken at the time of discussion of the Action Item (Discussion Item)
4. Presentation(s) (Discussion Item)
5. Consent Calendar *(Action Item)***
    - a. Proposed Action: Ratification of Program Investment Committee Name Change
    - b. Proposed Action: Ratification of Welfare-to-Work Plan Modification/Adjustment
6. Executive Committee Recommendations *(Action Item)***
    - a. Expenditure plan for FFY 2001 for Refugee Employment Social Services (RESS) and Targeted-Assistance (TA) Formula Allocations
    - b. Funding Recommendation for Homeless Employment Collaborative (HEC) Year Six
    - c. Ratification of Extension of Workforce Investment Act (WIA) Youth Programs for Four Months
    - d. Ratification of Extension of Youth Opportunity Grant Program
    - e. Adoption of Welfare-to-Work Wage Subsidy
7. Program Resources Committee Recommendations *(Action Item)**
    - a. Approval of Federal Fiscal Year 2001 Refugee County Plan
    - b. Approval of Expenditure Plan for Unobligated HEC Funds
8. Report of Chairperson
9. Report of President
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment (Action Item)

*Information to be sent under separate cover

**Information enclosed

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS **DATE:** JULY 18, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION FOR NAME CHANGE OF PROGRAM INVESTMENT COMMITTEE (PIC) (ACTION ITEM 5.a.)

The Workforce Investment San Francisco (WISF) Board is asked to approve a name change for the Program Investment Committee.

The acronym for the Program Investment Committee at present is PIC, and this may cause untold confusion, given that there is also an organization commonly known as PIC. Therefore, the Executive Committee recommends that the Program Investment Committee's name be changed to the Program Resources Committee (PRC).

cc: PIC Executive Staff
DHS Staff

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: AUGUST 17, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: EXECUTIVE COMMITTEE RECOMMENDATIONS FOR WELFARE TO WORK 85% FORMULA LOCAL PLAN ADJUSMENT/MODIFICATION FOR FY' 1998 AND FY 1999 (ACTION ITEM 5.b.)

The Workforce Investment Board is asked to approve the Welfare to Work 85% Formula Local Plan Adjustment/Modification. This Adjustment/Modification is required by the California Employment Development Department to describe how we will incorporate recent amendments to the federal Welfare to Work Grant Program into the San Francisco program. The attached Adjustment/Modification was approved by the Executive Committee at its August 17, 2001 meeting.

Adoption of the Plan Adjustment/ Modification is essentially an administrative step which will codify for the State the priorities and procedures already established as a result of the March 2001 Welfare to Work funding cycle.

BACKGROUND:

As part of the federal strategy for "welfare reform", the United States Department of Labor in 1998 initiated a national "Welfare to Work" (WTW) program. California's allocations of these WTW funds are administered by the California Employment Development Department (EDD). EDD, in turn, allocates these dollars, on a formula basis, to Private Industry Councils (PIC). In October 1998, the PIC received $2.3 million of federal WTW Formula Funds; in July 1999, the PIC received a second and final $2.1 million WTW allocation. Each allocation was to be spent within a three-year period, ending June 2001 and 2002 respectively. On December 22, 2000, this deadline was extended for up to an additional two years, to June 2004, with no additional funds.

In addition, the substance of the WTW Grant Program was recently modified at the federal level to expand the scope of who is eligible to receive services and the types of services that can be paid for with these dollars. These changes (the WTW Amendments of 1999) were enacted as part of Title VIII Consolidated Appropriations Act for fiscal year 2000.

On June 23, 1998, the PIC, in collaboration with the Department of Human Services and with extensive input from community groups and advocates, submitted the FY1997-2000 Federal Formula, Welfare-to-Work Plan for the City and County of San Francisco. This Plan was approved by the California Employment Development Department on September 24, 1998. The document before the Executive Committee today is a modification to this plan required as a result of the changes to the original WTW Grant Program.

The proposed WTW Formula Grant Modification does two things:

1. Formally requests the two year extension of time within which San Francisco will expend our remaining WTW funds; and

2. Explains how San Francisco will incorporate the newly eligible participants and activities into our program.

The substance of this WTW Formula Grant Plan Modification/Adjustment reflects the service priorities and target groups identified in the March 23, 2001 Welfare to Work Request for Proposals and the programs subsequently selected for funding by Workforce Investment San Francisco

The Plan is posted on the website of the Private Industry Council at www.picsf.org.

Workforce Investment San Francisco
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: AUGUST 17, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: EXECUTIVE COMMITTEE RECOMMENDATIONS FOR FEDERAL FISCAL YEAR (FFY) 2001 REFUGEE EMPLOYMENT SOCIAL SERVICES (RESS) AND TARGETED ASSISTANCE (TA) FORMULA ALLOCATIONS (ACTION ITEM 6.a.)

The Workforce Investment Board (WIB) is asked to approve an expenditure plan for FFY 2001 RESS and TA formula funds.

Background

Eleven proposals from seven organizations were received by the July 11 deadline in response to the Request For Proposals (RFP) issued June 20, 2001. Each proposal was read and scored by two members of the PIC review Task Force. The Program Resources Committee (PRC) met on August 1st and reviewed Staff's recommendations and evaluation materials, including individual evaluations of the proposals and their Program Summaries; Participant Characteristics and Enrollment Summaries; and Initial Determinations of Responsibility. The PRC also reviewed two funding scenarios presented by staff for its consideration and program performance data of applicable refugee subcontractors. (All of these materials were mailed to all WIB members prior to the PRC's August 1st meeting.) The Executive Committee approved the PRC's recommendations at its meeting on August 17, 2001.

Recommendations

The Executive Committee recommendations are included on the attached Table. The Table displays each of the proposals sorted by activity to facilitate comparisons between proposals, and includes requested funding amounts, preliminary funding amounts for FFY 2000, current funding levels, and initial recommendations for FFY 2001. The service levels for those proponents recommended for funding have been adjusted based on the dollar amount being recommended. The recommended placements are based on the proposed placement rate submitted by each proponent.

The total preliminary amount of funds available for services this year is $715,519, which is $56,395 less than last year (7%). The total amount of funds requested was $1,112,124 (transportation/childcare and set asides for vendors/OJT employers not included). We are expecting some carry forward funds from FFY 2000, but these will not be determined until November.

Funds distribution per activity

The chart below shows FFY 2000 initial funding distribution between the activities with a comparison of recommendations for FFY 2001.

Activity	FFY 2000	FFY 2001 Recomm
CIP	12%	12%
ES	52%	44%
VT/CA	15%	18%
IR/OJT	11%	16%
A/SAS	7%	7%
Supportive Services	3%	3%

CIP	Central Intake Point
ES	Employment Services
VT/CA	Vocational Training/Career Advancement
IR/OJT	Individual Referral/On-the-Job Training
A/SAS	Acculturation/Social Adjustment Services

These recommendations reflect the continued shift from Employment Services (ES) to Vocational Training (VT) and IR/OJT, because of the expressed desire of CalWORKs clients and other refugees for vocational training and IR/OJT.

I will be at your September 12th meeting to answer any questions you may have.

Attachment

cc: Refugee Proponents
Jay Nelson, CDSS
DHS Staff
PIC Staff

PROGRAM RESOURCES COMMITTEE FFY 2001 PRELIMINARY REFUGEE FUNDING RECOMMENDATIONS

Proponent	Activity	Amount Requested	Initial FFY 2000 Funding	Current FFY 2000 Funding*	Initial FFY 2001 Recom. Funding	TA	RESS	Recom.		Place. Rate
								Svc.	Plc.	
International Rescue Committee	CIP	$118,756	$93,511	$99,167	$85,862	$54,513	$31,349	NA	NA	NA
Catholic Charities/REAP	ES	$111,007	$141,123	$141,123	$92,500		$92,500	50	33	66%
Jewish Vocational Service	ES	$244,379	$195,335	$195,335	$197,440	$197,440		80	52	65%
African Imm. & Refugee Res. Center	ES	$50,000	$30,094	$30,094	$27,500	$27,500		11	7	64%
Catholic Charities/REAP	Broker	$28,000	$19,500	$37,500	$18,670	$18,670		10	8	80%
Jewish Vocational Service	Broker	$37,988	$0	$0	$18,990	$18,990		10	8	80%
Jewish Vocational Service	VT-IT	$120,638	$55,214	$70,989	$62,552	$62,552		14	11	79%
Jewish Vocational Service	VT-OTC	$132,254	$58,980	$88,469	$66,120	$66,120		15	12	80%
Oxman College	VT-Acc't	$120,000	$0	$0	$0					
International Institute of San Francisco	A/SAS	$50,150	$35,583	$50,491	$35,000		$35,000			
Jewish Family & Children's Services	A/SAS	$98,952	$0	$0	$15,885		$15,885			
Subtotal		$1,112,124	$629,340	$713,168	$620,519	$445,785	$174,734	190	131	69%
IR/OJT Set Aside			$65,000	$137,000	$75,000	$75,000				
Transportation/Childcare			$23,074	$36,185	$20,000	$15,000	$5,000			
Total			$717,414	$886,353	$715,519	$535,785	$179,734			
PIC Administration			$136,220	$139,284	$126,267	$94,550	$31,717			
Grand Total			$853,634	$1,025,637	$841,786	$630,335	$211,451			

*FFY 2000 funding totals do not include one agency's funding because it is not a proponent for FFY 2001 funds.

**Current FFY 2000 funding includes carry forward FFY 1999 funds.

CIP	Central Intake Point
ES	Employment Services
VT/IT	Vocational Training/Information Technology
VT/OTC	Vocational Training/Office Technology & Communication
VT/Acc't	Vocational Training/Accounting
A/SAS	Acculturation/Social Adjustment Services

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: AUGUST 17, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: FUNDING RECOMMENDATIONS FOR YEAR SIX (OCTOBER 1, 2001 TO SEPTEMBER 30, 2002) OF THE HOMELESS EMPLOYMENT COLLABORATIVE (ACTION ITEM 6.b.)

BACKGROUND

The Homeless Employment Collaborative (HEC) has been funded by the U.S. Department of Housing and Urban Development (HUD), initially by a three-year grant in 1996, which was renewed for two more years in 1999. The source of funds is the Stewart B. McKinney Homeless Assistance Act of 1987. The City and County of San Francisco applies for these funds annually. The grant is administered by the San Francisco Department of Human Services (DHS) and the PIC is the Project Sponsor for the HEC Program.

There are eleven (11) community-based organizations that, as members of the Collaborative, subcontract with the PIC to provide employment and training programs to homeless individuals. The current year, Year Five, will be completed on September 30, 2001.

In the spring of 2000, the City and County of San Francisco applied for McKinney funds for the year 2001 and the HEC was awarded a two-year renewal for the period October 1, 2001 to September 30, 2003. This renewal means that HEC will operate programs for Year Six and Year Seven.

This memorandum concerns the Executive Committee's recommendations for funding Year Six HEC subcontractors.

RECOMMENDATIONS

The total Year Six budget, based on the budget submitted to HUD in the 2001 applications is:

Total HUD Funds awarded	$1,060,899	(100%)
DHS Administration	$25,260	(2.4%)
PIC Administration	$25,259	(2.4%)
PIC Personnel (1.5 FTE) & Operating Costs	$100,284	(9.5%)
Participant Supportive Services	$50,000	(4.7%)
Participant Training (ten subcontractors)	$860,096	(81.0%)

There are three factors that affect the amount of funds available for subcontractors in the Year Six budget. First, the total renewal amount awarded by HUD includes a 3% cost of living increase. Secondly, one of the HEC subcontractors, San Francisco Vocational Services, on March 20, 2000 chose to withdraw from the Collaborative's application for renewal, which frees up employment and training funds for the remaining HEC subcontractors. Lastly, Swords to Plowshares (STP) has requested to change its program in Year Six from on On-the Job Training program (OJT) to a Direct Placement program, which PIC staff agrees would be a good idea. The result of such a change would also free up OJT set aside funds for distribution to other HEC subcontractors for employment and training subcontract funds.

Based on these three factors, **the Executive Committee recommends**:

- That the **3% cost of living increase** be passed on to the ten HEC subcontractors who were part of the HEC's application for renewal to HUD.
- That **STP be allowed to change its program activity** from an OJT program to a Direct Placement program.
- That the **funds made available** by the fact that Year Six will have ten rather than eleven subcontractors and the Year Six budget will not have to set aside OJT funds (the result of both being that there will be $46,902 of unallocated funds), **be referred to the PIC staff and to the HEC subcontractors for a joint recommendation on how to distribute these funds in Year Six.** This joint recommendation will be made to the Program Resources Committee at its next scheduled meeting.

The effect of these recommendations to date would result in Year Six Funding for HEC subcontractors as follows:

3%	YEAR SIX
$4,161	$142,861
$675	$23,751
$1,956	$67,169
$2,894	$99,374
$4,044	$138,835
$1,326	$45,526
$2,025	$69,525
$3,150	$108,150
2,194	$75,319
1,260	$43,260
3,685	$813,194

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Workforce Investment San Francisco
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: AUGUST 17, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: CONTINUATION OF CURRENT WORKFORCE INVESTMENT ACT (WIA) YOUTH FORMULA YOUTH SERVICES SUBCONTRACTORS (ACTION ITEM 6.c.)

The LWIB is asked to ratify a four-month continuation of funding of all current Workforce Investment (WIA) Title I B Youth Services subcontractors.

Background

This year, San Francisco received a total WIA youth formula allocation of $1,807,547. A strategic budget decision was approved by the Workforce Investment Board (WIB) at its June 13th meeting to allocate WIA youth formula funds as follows:

- 65% to training and participant support pools (transportation, child care, etc.)
- 35% to the “One Stop San Francisco” System and its infrastructure development (25% allocation will be augmented by up to 10% additional WIA funds); and,
- 10% for PIC Administration (WIA law);

The WIB also approved continuation of funding for four months to all current WIA adult subcontractors. Evaluation of current youth subcontractors and funding recommendations for the remaining eight months of WIA Program Year 01-02 (July 1, 2001 – June 30, 2002) will be presented to the Youth Council at a future meeting. Current WIA adult and youth services contracts will be extended from July 1, 2001-October 31, 2000.

The four-month continuation for WIA adult and youth subcontracts is necessary because subcontractors faced a myriad of barriers during the transition from JTPA to the WIA program last year. During the four-month extension period (July1, 2001 – October 31, 2001), performance data for the full twelve-months of the last Program Year (July 1, 2000 – June 30, 2001) will be used as a basis for performance evaluation and funding for the remainder of the year (November 1, 2001 – June 30, 2002). Performance data includes enrollments, placements, wages and retention.

Recommendation

The Executive Committee recommend ratifying the continuation of the WIA formula youth programs for four-months to coincide with an identical continuation of WIA adult's services subcontractors and to allow WIB Committees, the opportunity to review data for the full twelve month WIA program year (July 1, 2000 – June 30, 2001).

cc: PIC Senior staff & Operations staff
WIA formula funded subcontractors

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Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS **DATE:** AUGUST 17, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: CONTINUATION OF SECOND YEAR FUNDING FOR YOUTH OPPORTUNITY GRANT (YOG) SUBCONTRACTORS (ACTION ITEM 6.d.)

The LWIB is asked to ratify continuation of funding of all current WIA Title I-D Youth Opportunity Grant (YOG) subcontractors, including Operations and Maintenance Agreements with YO!SF Sites, site service contracts, and general services contracts. The total value of continued contracts is $2.7MM.

Background

The Private Industry Council, Inc. was one of thirty-six recipients (nationwide) awarded the Youth Opportunity Grant in April 2000. Since that time, efforts to implement the grant have been underway by the PIC, Inc., its partners in the Grant and the four Enterprise Communities in San Francisco, which are the recipients of the Grant's resources. All four YO!SF sites are currently operational and offering services to youth who reside in the Enterprise Communities. The YO!SF Soma site celebrated a "Grand Opening" co-hosted by Mayor Willie L. Brown, Jr. on June 28, 2001. The YO!SF Sunnydale Opening Celebration is scheduled for August 23, 2001.

This continuation for WIA Youth Opportunity Grant (YOG) Title I-D youth subcontracts is necessary because subcontractors faced a myriad of barriers during the initial start-up and implementation of the YO! SF program. The initial term of these subcontracts was six months of PY 00-01 (Jan 1, 2001 – June 30, 2001). The Youth Council will develop a Request for Proposals for additional YO! SF services in the near future.

First year performance data for the subcontracts will be available in March 2002. The Youth Council will evaluate the first year performance of subcontractors as soon as the data is available for analysis.

Recommendation

The Executive Committee recommends ratifying the continuation of the WIA Title I-D Youth Opportunity Grant (YOG) contracts for the agencies and services listed on the attached chart. The attached chart also includes a description of YO!SF services currently provided.

cc: PIC Senior staff & Operations staff
WIA formula funded subcontractors

Attachments

Workforce Investment San Francisco
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: JULY 18, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: EXECITIVE COMMITTEE RECOMMENDATIONS FOR WAGE SUBSIDY GUIDELINES FOR WELFARE TO WORK CONTRACTS (ACTION ITEM 6.e.)

The Workforce Investment Board is asked to approve Welfare to Work (WtW) program guidelines for wage subsidies. The Program Resources Committee (PRC) held a public hearing on these guidelines on July 11, 2001. The recommendations of the PRC were reviewed and adopted by the Executive Committee on July 18, 2001.

Background

"Job Creation through Wage Subsidy" is one of the allowable training activities in the Welfare to Work programs administered by PIC. This activity provides a participant with a job in the public, non-profit or private for-profit sector where a wage subsidy is available to the employer. The participant draws a salary and is considered an employee. Depending on the arrangement, the employee may or may not be retained when the subsidy ends.

Because limitations on the cost and duration of wage subsidies are not established in the regulations associated with the various Welfare to Work funding streams, it was requested that the Program Investment Committee provide guidance to PIC staff in the use of welfare to work funds for this purpose.

On March 16, 2001, the Private Industry Council issued a Request for Proposals (RFP) and Request for Qualifications (RFQ) to provide employment and training services for CalWORKs, PAES and Non-Custodial Parents. On June 13, 2001 the Workforce Investment Board gave final approval to the portfolio of training Subcontractors and Vendors selected through this RFP process.

Six different funding streams are included in the Welfare to Work program administered by PIC. These are:

1. Formula Welfare to Work
2. State Match to Welfare to Work
3. County General Funds
4. CalWORKs Incentive Funds
5. CalWORKs Block Grant
6. Food Stamps Employment and Training (FSET)

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The regulations associated with the first five of these funding streams allow us to use these dollars for "wage subsidy" as a training activity. The last one, FSET does not.

The per-person cost for wage subsidies requested by successful proponents under the Welfare to Work RFP/RFQ varied greatly. A summary of the wage subsidy component of those programs follows:

Occupation or Sector	Training Wage Per Hour	Wage Subsidy Per Hour	Duration of Wage Subsidy	Per Person Cost for Subsidy
Legal Assistant	$10.00	$1.00* (10%)	20hrs/wk 12 weeks 240 hours	$240
Food Preparation	$7.50	$5.63 (75%)	15-20 hrs/wk 4-8 weeks 60-160 hours	$338 to $900
Clinical Assist. Unit Coordinator	$7.25	$7.25 (100%)	16 hrs/wk 12 weeks 192 hours	$1,392
Arts – Administrative Assistant & Other Entry Level	$9.00	$7.20 (80%)	20 hrs/wk 12 weeks 240 hours	$1,728
Health Care Administrative Assistant & Other Entry Level	$12.27	$12.27 (100%)	40hrs/wk 20 weeks 800 hours	$9,816
Journalism / Alternative Media	$15.00	$15.00 (100%)	40hrs/wk 52 weeks 2,080 hours	$31,200

* Varies by employer

Recommendations

The following guidelines are recommended by the Program Investment Committee for the use of training funds in Welfare to Work Subcontracts and Vendor Contracts approved by the Workforce Investment Board at its June 13, 2001 meeting.

1. The wage paid to trainees during the subsidized training period should be no higher than, and ideally some amount below, the unsubsidized wage of the position or job classification for which the participant is being trained. Trainees should achieve an increase in their income as a result of advancing from training to unsubsidized employment.

2. Total wages paid to WtW participants (regardless of whether they are unsubsidized, partially subsidized, or wholly subsidized with public funds) shall be comparable to wages paid to regular employees or trainees in the same or similar positions of the employer at which training and services are being provided.

3. Total wages paid to WtW participants during training shall be below the income threshold for receipt of cash aid.

4. For employers where collective bargaining agreements already exist, all parties to each affected agreement shall provide their written agreements with any proposed wage

subsidization before it is authorized.

5. The duration of the subsidized employment component of a training program should be determined by a reasonable projection of the time needed to acquire the identified job skills for the target occupation and for the person to be served. The number of hours of subsidized employment will be up to 800.

6. Every effort should be made to secure an employer contribution to the training wage, but is not required.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO LOCAL WORKFORCE INVESTMENT BOARD

Date:	Wednesday, September 12, 2001
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Location:	Yerba Buena Center for the Arts Center for the Arts Theatre 700 Howard Street San Francisco CA 94103

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1 Dr. Carlton B. Goodlett Place
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Issued: Wednesday, September 5, 2001

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   - a. Proposed Action: Ratification of Program Investment Committee Name Change
   - b. Proposed Action: Ratification of Welfare-to-Work Plan Modification/Adjustment
6. Executive Committee Recommendations *(Action Item)*
   - a. Expenditure plan for FFY 2001 for Refugee Employment Social Services (RESS) and Targeted-Assistance (TA) Formula Allocations
   - b. Funding Recommendation for Homeless Employment Collaborative (HEC) Year Six
   - c. Ratification of Extension of Workforce Investment Act (WIA) Youth Programs for Four Months
   - d. Ratification of Extension of Youth Opportunity Grant Program
   - e. Adoption of Welfare-to-Work Wage Subsidy
7. Program Resources Committee Recommendations *(Action Item))***
   - a. Approval of Federal Fiscal Year 2001 Refugee County Plan
   - b. Approval of Expenditure Plan for Unobligated HEC Funds
8. Report of Chairperson
9. Report of President
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment (Action Item)

*Information to be sent under separate cover

**Information enclosed

Workforce Investment San Francisco
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: LOCAL WORKFORCE INVESTMENT BOARD (LWIB) MEMBERS

DATE: SEPTEMBER 5, 2001

FROM: EXECUTIVE COMMITTEE

SUBJECT: **ADDITIONAL INFORMATION:** EXECUTIVE COMMITTEE RECOMMENDATIONS FOR WELFARE TO WORK 85% FORMULA LOCAL PLAN ADJUSMENT/MODIFICATION FOR FY' 1998 AND FY 1999 (ACTION ITEM 5.b.)

The Workforce Investment San Francisco (WISF) Board is asked to approve the Welfare (WtW), to Work 85% Formula Local Plan Adjustment/Modification. This Adjustment/Modification is required by the California Employment Development Department to describe how we will incorporate recent amendments to the federal Welfare to Work Grant Program into the San Francisco program. The Executive Committee at its August 17, 2001 meeting approved the Adjustment/Modification that was previously mailed to you.

Inadvertently information for the newly targeted population was not included in the Adjustment/Modification at the August 17, 2001 meeting. We are including that additional information in the attached document. The new information is located under the narrative for Part II (A)(1) on page 5, subsection (a). Please substitute the attached page 5 for the previously page 5 received.

Adoption of the Plan Adjustment/Modification is essentially an administrative step which will codify for the State the priorities and procedures already established as a result of the March 2001 Welfare to Work funding cycle.

The Plan with the additional information is posted on the website of the Private Industry Council at www.picsf.org.

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WtW Local Plan	☒ 2001 Plan Adjustment	☐ Other Modifications	No. **W800944/965827**
Local Area	**San Francisco**		Date **July 20, 2001**

NARRATIVE FORMS FOR WtW FORMULA GRANT

PART II—ELIGIBILITY

Part II—Section A (1) Eligible Populations

Describe new target populations incorporated into your program by the 1999 WtW Amendments. These include Foster Youth between the ages of 18-24, CalWORKs recipients with significant barriers to self-sufficiency and custodial parents with incomes below federal poverty standards.

Due to the Welfare-to-Work and Child Support Amendments of 1999, the newly targeted population include:

a. **Individuals receiving CalWORKs Assistance who have been on aid 30 months or longer (no other barrier required)**

b. Non-Custodial Parent (NCP)

- who is either unemployed, underemployed or having difficulty paying child support and meet one of the following eligibility requirements as outlined below:
- Minor child or custodial parent has received TANF assistance for 30 months or more, or will become ineligible for TANF assistance within 12 months due to federal 60-month lifetime limits; or
- Minor child is eligible for or is receiving TANF assistance; or
- Minor child has received TANF assistance in the 12-month period before the date of determination, but no longer receives assistance; or
- Minor child is eligible for or is receiving under the Food Stamp program, the Supplemental Security Income program, Medicaid, or the Children's Health Insurance Program.

The NCP is willing to enter into a "Personal Responsibility Contract" within 90 days of enrolling in employment services.

The PIC, Inc., in collaboration with its subcontractors and the SFDHS, will ensure that no more than a maximum of seventy percent of all "Federal-Formula and Matching Welfare-to-Work Funds" are expended for this newly added population under the requirements of subsection 403 (a)(5)(C)(ii) of the Social Security Act.

c. At Risk of Long Term Dependency
Individual who is currently receiving CalWORKs assistance but less than 30 months on aid **and** has at least **one** of the following characteristics associated with or predictive of long-term welfare dependence:

- High school drop out (participant disclosure)
- Poor work history (source: Participant Background Form 7000 CW, on file at SF DHS)
- Ex-offender (participant disclosure)
- Homeless (currently homeless with documentation)

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD
MAYOR WILLIE L. BROWN, JR.

DATE: SEPTEMBER 5, 2001

KzA for TR

FROM: TRENT RHORER, PROGRAM RESOURCES COMMITTEE CHAIR

SUBJECT: STAFF RECOMMENDATIONS FOR FEDERAL FISCAL YEAR (FFY) 2001 REFUGEE COUNTY PLAN **(ACTION ITEM 7.a)**

The Workforce Investment San Francisco (WISF) Board is asked to approve the FFY 2001 San Francisco Refugee County Plan.

The Program Resources Committee (PRC) met on September 5th, reviewed staff's recommendations for the Plan, and solicited public testimony. No changes to staff's recommendations were put forth by Committee members or the public. Unfortunately, a quorum was not reached at that meeting and no formal vote was taken, therefore I am forwarding staff's recommendations to the WISF for its approval. Please refer to the complete copy of the Plan that was mailed to all WISF members prior to the September 5th PRC meeting.

Background

The design and selection criteria for a Request For Proposals were approved by the WISF Board in June, and individual subcontractor program funding was approved by the Program Resources and Executive Committees in August. Elements of the RFP design and funding plan form the basis for the FFY 2001 Refugee County Plan. The attached Plan is in the format required by the California Department of Social Services' Refugee Programs Branch (RPB).

The mix of employment services planned mirrors the program funding approved by the Committees and reflects the need to offer quality training so refugees are enabled to successfully compete in the Bay Area's highly competitive labor market and keep pace with changes in the new economy. San Francisco has an abundance of overqualified job seekers with whom refugees compete. Consequently, we offer refugees vocational training, on-the-job training and individual referral training.

County Plan Goals

The following table contains proposed FFY 2001 goals and the State-approved FFY 2000 goals. The proposed FFY 2001 caseload (enrollment) goal of 202 equals the service level (190) proposed by the agencies approved for funding through the RFP

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combined with the service level (12) of Jewish Vocational Service's (JVS) Targeted Assistance (TA) Discretionary Licensed Vocational Nurse (LVN) program. The average hourly wage goal ($10) is the same as the living wage included in the City's Minimum Compensation Ordinance and was also the minimum average wage solicited in the Request For Proposals (RFP). The remaining goals are estimates based upon historical data of whom we have served and their outcomes.

	FFY 2000	FFY 2001
Caseload	278	202
Employment Entry Rate	57%	57%
Cash Assistance Termination Rate	60%	60%
Cash Assistance Reduction Rate	40%	40%
Average Hourly Wage	$9	$10
Employment Retention Rate (90 days)	75%	75%
Entered Employment with Health Benefits Rate	75%	75%

The Plan will be submitted for Board of Supervisors approval subsequent to WISF approval.

The Plan goals will have to be revised after we are able to determine the amount of carry-forward funds. We will make additional recommendations at that time.

Staff will be available at your September 12th meeting to answer any questions you may have. If you would like another copy of the complete Plan, please call Karen Hart, the PIC's Refugee Program Coordinator at 923-4260.

cc: Program Investment Committee Members
Refugee Proponents
Jay Nelson, CDSS/RPB
DHS Staff
PIC Staff

PRIVATE INDUSTRY COUNCIL
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MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD
MAYOR WILLIE L. BROWN JR.

DATE: SEPTEMBER 5, 2001

FROM: TRENT RHORER, CHAIR JK for TR
PROGRAM RESOURCES COMMITTEE

SUBJECT: STAFF RECOMMENDATIONS REGARDING THE DISTRIBUTION OF UNOBLIGATED FUNDS IN THE YEAR SIX BUDGET OF THE HOMELESS EMPLOYMENT COLLABORATIVE. (ACTION ITEM 7.b)

BACKGROUND

The WIB Program Resources Committee (PRC) considered recommendations for the distribution of unobligated funds in the Year SIX (October 1, 2001 to September 30, 2002) budget of the Homeless Employment Collaborative (HEC) at its meeting on September 5, 2001. However, since the PRC did not have a quorum, the PIC staff makes these recommendations. The committee discussed the recommendations and public testimony was heard but no formal vote was taken.

The unobligated funds are the result of two factors. First, San Francisco Vocational Services (SFVS), a Year Five HEC subcontractor, chose not to be a part of the City and County of San Francisco's application for renewal of Stewart B. McKinney funds for homeless services and secondly, Swords to Plowshares (STP) requested to change its Year Six program from an On-the-Job Training program (OJT) to a direct placement program, which request you approved on August 1, 2001. The funds previously obligated in Year Five to SFVS and the funds previously obligated in Year Five to the set aside for employer reimbursement in STP's OJT program make up the $46,902 of unobligated funds.

RECOMMENDATIONS

1. **The PIC Staff recommends** that $16,902 be added to the Supportive Services set aside for HEC participants' extraordinary costs such as emergency rental assistance, emergency medical and dental assistance that are necessary for a homeless individual to stay in a training program or to stay on a job.

2. **The PIC Staff recommends** that $30,000 be distributed to the Year Six HEC Subcontractors on a prorated basis of the recommended amount of subcontract funds. The results of this recommendation are:

HEC Subcontractors	Subcontract and % of Total		Additional Funds
Arriba Juntos	$142,861	(18%)	$5,400
Episcopal Community Services	$138,835	(17%)	$5,100
Northern California Service League	$108,150	(13%)	$3,900
Community Housing Partnership	$ 99,374	(12%)	$3,600
Swords to Plowshares	$ 75,319	(9%)	$2,700
Mission Hiring Hall/SOMEC	$ 69,525	(9%)	$2,700
Central City Hospitality House	$ 65,213	(8%)	$2,400
Goodwill Industries, Inc.	$ 45,526	(6%)	$1,800
Toolworks, Inc.	$ 43,260	(5%)	$1,500
Catholic Charities, St. Jos. Village	$ 23,751	(3%)	$ 900
Totals	$813,194	(100%)	$30,000

3. **The PIC staff recommends** that, during Year Six contract negotiations, the PIC staff be authorized to negotiate increases in the service level of subcontractors on a case-by-case basis to make up for the fifteen (15) training slots that the HEC lost as a result of SFVS withdrawing from the HEC.

The PIC staff will be available at your meeting on Wednesday, September 12, 2001, to answer any questions you may have regarding these recommendations.

cc: George Smith, Mayor's Office on Homelessness
Mikyung Kim, SHP Grant Manager, DHS
PIC Staff
HEC Subcontractors

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

Date:	Friday, October 12, 2001
Time:	9:30 a.m. – 11:30 a.m.
Location:	Yerba Buena Center for the Arts The Forum 701 Mission Street San Francisco CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at *www.ci.sf.ca.us/infoctr/sunshine/index.htm*

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: Monday, October 1, 2001

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Revised Agenda

1. Adoption of the Agenda (*Action Item*)
2. Adoption of Minutes for June 13, 2001 *(Action Item)***
3. Public Testimony will be taken at the time of discussion of the Action Item (Discussion Item)
4. Presentation(s) (Discussion Item)
5. Consent Calendar *(Action Item)*
    a. Proposed Action: Ratification of Program Investment Committee Name Change**
    b. Proposed Action: Ratification of Welfare-to-Work Plan Modification/Adjustment (including wage subsidy)**
    c. Proposed Action: Ratification of Amendments to Welfare-to-Work Local Plan**
    d. Proposed Action: Ratification of Federal Fiscal Year 2001 Refugee County Plan**
    e. Proposed Action: Authorization for Participation in Young Offenders Demonstration Grant*
6. Executive Committee Actions *(Action Item)*
    a. Proposed Action: Ratification of Expenditure Plan for FFY 2001 for Refugee Employment Social Services (RESS) and Targeted-Assistance (TA) Formula Allocations**
    b. Proposed Action: Ratification of Funding Recommendation for Homeless Employment Collaborative (HEC) Year Six **
    c. Proposed Action: Ratification of Expenditure Plan for Unobligated HEC Funds**
    d. Proposed Action: Ratification of Extension of Workforce Investment Act (WIA) Youth Programs for Four Months**
    e. Proposed Action: Ratification of Eight Months Funding Recommendations for WIA Adult Service Subcontractors**
    f. Proposed Action: Ratification of Extension of Youth Opportunity Grant Program**
    g. Proposed Action: Ratification of an Expenditure Plan for the Compliant Operation of the Full Services One Stop Center**
7. Report of Chairperson
8. Report of President
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Agenda Items (Discussion Item)
11. Adjournment (Action Item)

*Information enclosed

**Information was sent with the September 12th WIB and the September 19th Executive Committee meeting materials.

The City and County of San Francisco, led by the Mayor's Criminal Justice Council, for the Department of Labor's Young Offender Initiative Demonstration Grant Program, are undertaking an expansive collaborative effort. This project will intervene with young women between the ages 16-24 who are serious multiple offender recidivists. A continuum of services, including access to customized training and to specific employment opportunities, shall be offered to address the multiple needs of this underserved population. Participants will be served by an age- and developmentally-appropriate continuum of services.

Participants: The Mayor's Criminal Justice Council (MCJC) is joined in the Demonstration Project by the:

- San Francisco County Sheriff's Department
- San Francisco Department of Public Health (encompassing the divisions of Community Substance Abuse Services and Community Mental Health's Transitional Youth Services)
- San Francisco Juvenile Probation Department
- San Francisco Adult Probation Department
- San Francisco District Attorney's Office (including the Victim Services Unit)
- Workforce Investment SF/Private Industry Council (including YO SF! Youth Opportunity Centers)
- SFWorks (a branch of the San Francisco Chamber of Commerce)
- Standing Against Global Exploitation
- Center for Young Women's Development
- Center on Juvenile and Criminal Justice
- Women In Community Service
- Community Works

This Demonstration Program is consistent and will interface with the many youth violence and gang prevention and intervention activities that are currently underway in San Francisco.

Target Population: Participants in the Program will be between ages of 16-24, involved with a gang, serious multiple recidivists, and demonstrate willingness to participate in the program. Some 50 participants will receive highly coordinated assertive case management services from a multi-agency, multi-disciplinary team.

The participants targeted for the Program will be young female offenders who are:

- Housed at the Youth Guidance Center (YGC),
- On probation, and/or
- Housed in the County Jail.

The current legal charges, criminal history, and the District Attorney's ability to modify the sentence will be among the factors in determining eligibility. Staff at the YGC and the County Jail will recruit and enroll of participants. Young women who self-report an interest in the program or who are identified as a result of their participation in other services during custody will also participate.

Program Design:

Assessment and Case Management: The collaborative will work closely to determine the skills/needs profiles for each participant. A multidisciplinary and gender-specific assessment instrument will be administered to all potential participants as the first step in the intake process. Following the assessment, a team consisting of representatives from in-custody and post-release programs and the participant will devise a Personal Responsibility Plan that articulates specific jail-based and community-based services. . During this time, they will provide job counseling, moral support, and referrals to other community-based services that support employment.

Employment Services: Employment services will be coordinated through the Private Industry Council of San Francisco's Youth Opportunities (YO'SF) network. Four Enterprise Communities have YO SF! Youth Opportunity Centers that have implemented a "one-stop" service system. The Centers are located in ethnically diverse areas of the City where young people are most at-risk for joblessness. Each Center will offer participants access to a range of services and resources that include education, job preparation, employment, citizenship and leadership training, mentoring, and job development and placement activities.

Support Services: In combination with employment and education services, participants will be linked to programs that provide transitional and permanent housing, mental health and substance abuse treatment, transportation, and childcare. For participants ages 18-24, San Francisco proposes to utilize gender-specific Life skills Empowerment Workshops, interactive trainings that will include life management issues such as conflict resolution, assertiveness training, re-entry challenges, money management, childcare issues, family and personal health, behavior addictions, and healthy relationships. In the pre-release phase, all participants will be matched with peer mentors through Standing Against Global Exploitation (SAGE) and the Center for Young Women's Development.

Juvenile/Criminal Justice Involvement: The grant will provide funding to support Juvenile/Adult Program intensive supervision caseloads for this project. Probation officers will be active participants in the case planning and care coordination teams. At the completion of twelve months of successful participation in the program, which means successfully completing the Personal Responsibility Plan, the District Attorney will modify the sentence or, if appropriate, discharge the case against the young woman. In the event that, after 12 months of participation, all program requirements have not been met, the Court may extend the term of participation

Governance and Oversight:

The advisory board will be comprised of youth and graduates of other young offender programs, parents, and organizations from the public and private sectors. The efforts of this advisory board shall be aligned with the activities of San Francisco's existing local Youth Council.

Funding

The Mayor's Criminal Justice Council will ask for $1.5 million for each year of the two year Demonstration Program and it is expected that 75 individuals will successfully complete the program.

Developing Sustainable Funding: The collaborative intervention strategies proposed in San Francisco's Demonstration Program would require innovative funding strategies. The Center for Juvenile and Criminal Justice (CJCJ) will work with the partners in this effort to develop and implement blended funding strategies. CJCJ will provide technical assistance to develop the capacity of agencies to identify and access varied funding sources.

The grant writer for this proposal is Resource Development Associates funded by Mayor's Criminal Justice Council.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

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Date: Wednesday, November 14, 2001

Time: 9:30 a.m. – 11:30 a.m.

Location: Pacific Bell
Embarcadero Hall
370 Third Street
San Francisco, CA 94107

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below.

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

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Sunshine Ordinance Task Force
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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Revised: Wednesday, November 7, 2001

PROPOSED AGENDA

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony on Agenda Items *(Discussion Item)*
3. Approval of the Minutes for October 12, 2001 Meeting *(Action Item)**
4. Presentation
5. Consent Calendar
    a. Submission of Proposal for Governor's 15% WIA Discretionary Funds *(Action Item)***
6. Youth Council Recommendation
    a. Proposed Action: Approval of WIA Title 1B Youth Eight Month Funding Recommendations *(Action Item)***
7. Recommendation for Modifications to the Strategic Five Year Workforce Investment Act Plan for the City and County of San Francisco *(Action Item)***
8. WIB Meeting Schedule for 2002 *(Action Item)*
9. Public Testimony on Non-Agenda Items *(Discussion Item)*
10. Future Agenda Items *(Discussion Item)*

**Information to be sent.*
*** Information enclosed.*

PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.
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employment
opportunities

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD **DATE:** NOVEMBER 7, 2001

FROM: PAMELA S. GALLOWAY
PRESIDENT

SUBJECT: SOLICITATION FOR PROPOSALS FUNDED BY GOVERNOR'S 15% WIA DISCRETIONARY FUND (Agenda Item 5.a)

On October 16, 2001, the Private Industry Council of San Francisco, Inc. (PIC) received notice of a Solicitation for Proposals funded by the Governor's 15% WIA Discretionary Fund. The notice was issued by the California Workforce Investment Board (State WIB), and is included for your information. **Proposals will be accepted by the State until 5:00 pm, November 9, 2001 (this Friday).**

PIC has received numerous calls concerning this solicitation. Some potential proponents asked for a letter of support from the WIB and/or PIC. Other proponents asked PIC to provide grant administration services, including certification of participants, date collection and reporting. On October 26, 2001, I issued a memorandum to potential proponents concerning this solicitation (also included). **Proponents are asked to ensure the receipt by PIC of summaries of proposals which request WIB or PIC participation by close of business today, November 7.**

Include with this memorandum are the proposal summaries received to date by PIC. I anticipate that additional proposals will be received before your meeting on November 14. Any additional proposal summaries received will be provided to you at your meeting on November 14.

Staff strongly recommend that this WIB consider a policy to govern the future endorsement of proposals that respond to State or federal solicitations. If you have any questions about this solicitation, please contact Wes Dixon at 415.923.4261.

Thank you.

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OCT 16 2001
PAMELA S. CALLO

California Workforce Investment Board

Lawrence Gotlieb
Chairman

Christine Essel
Vice Chair

Gray Davis
Governor

October 15, 2001

777 12th Street, Suite 200
Sacramento, CA 95814

ERRATA TO OCTOBER 10, 2001 ANNOUNCEMENT

Please replace any copies of the above announcement you may have with the following revised announcement.

SOLICITATION FOR PROPOSALS ANNOUNCEMENT

The California Workforce Investment Board (State Board) awarded $20 Million in Workforce Investment Act (WIA), Governor's 15% Discretionary Fund last program year. The State Board is currently soliciting proposals for Program Year 2001/2002 and will announce the amount of available funds on our website. Proposals will be accepted until 5 PM, November 9th, 2001. Funds are available to support WIA specific initiatives that address:

- **Broad support services** that address workforce concerns which directly affect an individual's capacity to work, e.g., child care, transportation, housing, etc.
- **Research and development** projects that directly complement the WIA required and allowable activities.
- **Pre/apprenticeship initiatives** that might include exposure or information about career ladders and skill standards development.
- **Proposals that support or enhance specific industry demand and/or provide occupational focus**, e.g., health care issues revolving around nursing and paramedic worker shortages, entertainment/multimedia, small business, agriculture/farmworkers, and industries affected by the September 11, 2001 terrorist attacks (e.g., airline industry downsizing and economic losses in the tourism industries).
- **Jobs that** pay family-sustaining wages, provide benefits and offer advancement opportunities; look to establish "high road" training partnerships (union together with employer) in order to develop training programs that create skill-based career ladders.

- **Proposals that create, train for, or otherwise develop high quality jobs**; e.g. jobs that pay family-sustaining wages, provide benefits, and offer advancement opportunities for new workers and skill based career ladders for entry-level workers. Such proposals should include union and employer participation in defining the goals, objectives and other outcomes.
- **Youth Initiatives** that could include career advisement, industry-based internships, paid work experience and/or are focused on specific youth groups, (e.g., out of school youth)
- **System or infrastructure building** within local and regional areas, support for regional partnerships, and
- **New technology projects**. These types of projects could be stand-alone demonstration projects or system enhancement projects within any industry.

This Solicitation for Proposals (SFP) supports both the Governor's Workforce Preparation agenda and the goals and vision of the State Board.

The SFP package is available on the State Board's web site at www.calwia.org/whats_new.tpl and on the California Employment Development Department's website at www.edd.ca.gov/emptran.htm#wtf.

To request a printed copy, please call us at (916) 324-3425.

✓ cc: Pamela Calloway
Amanda

California Workforce Investment Board

Lawrence Gotlieb
Chairman

Christine Essel
Vice Chair

Gray Davis
Governor

777 12th Street, Suite 200
Sacramento, CA 95814

October 10, 2001

RECEIVED
OCT 1 7 2001
PAMELA S. CALLOWAY

SOLICITATION FOR PROPOSALS ANNOUNCEMENT

The California Workforce Investment Board (State Board) announces the availability of $22 Million dollars from the Workforce Investment Act (WIA), Governor's 15% Discretionary Fund for program year 2001-2002. Funds are available to support WIA specific initiatives that address:

- Unmet immediate and long-term workforce preparation needs,
- Special population needs,
- Infrastructure development to ensure efficient and effective use of public resources,
- Local population needs related to conditions arising from crises or emergencies,
- Development of workforce services that benefit not just the eligible individuals but the communities in which they reside, and
- Other education and workforce preparation needs not currently available or adequately addressed by current Workforce Investment Act (WIA) programs in California.

This Solicitation for Proposals (SFP) supports both the Governor's Workforce Preparation agenda and the goals and vision of the State Board.

The SFP package is available on the State Board's web site at www.calwia.org/whats_new.tpl and on the California Employment Development Department's website at www.edd.ca.gov/emptran.htm#wtf.

To request a printed copy, please call us at (916) 324-3425.

PRIVATE INDUSTRY COUNCIL
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MEMORANDUM

TO: INTERESTED BIDDERS
FOR GOVERNOR'S WIA FUNDS

DATE: OCTOBER 26, 2001

FROM: PAMELA S. CALLOWAY
PRESIDENT

SUBJECT: PIC SUPPORT FOR PROPOSALS FROM SAN FRANCISCO

On October 12th, the California Workforce Investment Board released a Solicitation for Proposals (SFP) inviting proposals for Governor's 15% Discretionary funding under the Workforce Investment Act (WIA). Proposals are due November 9, 2001. The complete SFP is posted on http://www.calwia.org.

My staff has received a number of telephone calls asking for information about coordinating with the local Workforce Investment Board and the Private Industry Council. Thank you for the inquiries. Communication and collaboration are vitally important to the development of a comprehensive workforce development system in San Francisco. The following guidance is provided to assist you in reaching a decision about whether or not to submit a proposal in response to the Governor's solicitation:

- The PIC encourages any and all proposals that meet the intent of the Act, the Governor's selection criteria, and the objectives of San Francisco's Strategic Five-Year Plan (see http://www.picsf.org/wia/wia_plan.htm).

- The PIC, on behalf of the WIB, may be able to provide a letter of support for your proposal if you fax a one-page summary of it to Alice Chiu at (415) 923-6966. Alice must receive Summaries of proposals no later than **Wednesday, November 7 at 5:00 p.m.** Proposals will receive support if your agency satisfies applicant requirements (i.e., Federal & State Tax Identification). I urge you to prepare proposals that do not duplicate efforts already underway with WIA dollars (see www.picsf.org for WIA funded program descriptions). Informational copies of your fax will be provided to the WIB's Executive Committee at its next regular meeting.

- The grant writing resources of the PIC, Inc. are currently oversubscribed. PIC, Inc. is not able to write the proposal for your agency at this time. However, if you envision a partnering role for the PIC, please provide for that role in your proposal and in your budget. PIC is able to serve as your administrative entity, fiscal agent, certifier of participant eligibility, and/or other mutually agreed to roles. If you are interested in a partner role for PIC, **please call Adrian Trujillo immediately.** Adrian may be reached at (415) 923-4263.

Thank you for your interest in and commitment to workforce development. If you have further questions, please contact Alice Chiu or Mary Fernandez at (415) 923-4003. They will direct your call to the appropriate PIC Staff member.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: *411@picsf.org*

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

Executive Summary
Response to the Governor's 15% Discretionary Fund Solicitation for Proposals

This is collaboration between Florence Crittenton Services, The Family Restoration House, the Private Industry Council of San Francisco and the University of California, San Francisco. The jobs the project will train for are Administrative and Clerical positions that only provide benefits but pay family-sustaining wages and offer opportunities for advancement with in the UCSF system.

The target service groups for this proposal is un- and under-employed Southeast sector and Western Addition residents with limited work histories. Specifically, the program target males and females at least 18 years of age who lack specific job competencies and experience barriers that preclude them from effectively engaging in job search activities and securing employment. The geographical focus of this project is primarily the southeast sector of San Francisco and secondarily San Francisco's Western Addition neighborhood. Both communities are historically and currently enclaves of African-american life and culture for the City. Census 2000 data indicates that the highest portion of the City's Black population reside in these areas. Unemployment rates for these areas of the city far exceed those of the City as a whole. In fact, the unemployment rate for the southeast sector alone consistently hovers at 16.5% as compared to the 3% experienced by the city as a whole. The median income for both neighborhoods is below that of the city as a whole. Residents in both areas find it difficult to make ends meet in a City where the calculated sustainable wage is $12.00 per hour. The southeast sector is geographically isolated. Many agencies provide social support services to its residents but few provide comprehensive job skill training and access to employment at the completion of training.

Florence Crittenton Services is a 501 (c) 3 organization certified by both the state and federal governments. over 100 years old and provides basic services to a growing poor and disenfranchised segment of our population. Today, we provide residential care, child care services, educational planning, and job exploration/opportunities to young people who want to finish school, gain valuable skills and become better prepared for the job market. Family Restoration House is an emerging employment and workforce development agency in the southeast sector of San Francisco. Their staff has over thirty years of experience providing employment training to hard to serve clients. It was created to meet the challenges of non-traditional families. UCSF is San Francisco's second largest employer and provides some 16,000 jobs to the City & County. For six years, UCSF has worked with FCS and other SF CBO's to provide work experience and other opportunities for SF's indigent and working poor families. The PIC of SF is the WIA administrator for City & County of San Francisco with a long history of administering employment and training activities. They will act as the certifier and data management entity for this partnership. As the WIA administrator, they are well versed in the protocols and procedures necessary to report and manage data to the state's WIB and its entities.

The Community Outreach Internship Program developed the Learning + Earning = Achievement & Power (L.E.A.P.) curriculum to address the needs of participants and provide instruction appropriate to administrative assistant positions at UCSF. The program uses class-room and hands-on work experience to train participants. The goal of the project is (over the course of 24 months) to prepare 24 participants from the southeast sector of San Francisco and the Western Addition with services that will prepare them for administrative work with the University of California San Francisco. Objective 1: For the PIC certify at least 24 individuals for potential inclusion in a cohort group of up to 12 participants for the program. Objective 2: For Florence Crittenton and Family Restoration House to provide a cohort group of up to 12 participants with 10 weeks of classroom based training that prepares them for transition into the internship component of the program. Objective 3: For UCSF to provide a cohort group of up to 12 participants with 5 months of paid work experience at the University of California San Francisco. Objective 4: For FCS and FRH to provide a cohort group of up to 12 participants with the job search and job placement services after completion of the internship portion of the program. Objective 5: For FCS and PIC to track all program participants for at least one year after completion of the program. The Return on Investment: for participants is increased marketable/transferable job skills and access to information about viable work opportunities, for the partnership is an opportunity to effectively train new potential workers, and for the community is an increase in the number of individuals able to positively contribute to its viability and sustainability.

Young Community Developers, Incorporated

(415) 822-3491 / 1715 Yosemite Avenue San Francisco, CA 94124 / Fax (415) 822-4958

EXECUTIVE SUMMARY

Young Community Developers has grown tremendously over the past four years. With recent success and increased confidence levels, the organization has become the primary community advocacy and job training organization in the southeast sector of San Francisco offering free hard skills training for low-income residents. Research indicates that 80% of our service population resides within the guidelines for WIA eligible services.

Our mission is to design strategies to empower youth and adults and to create thought-provoking solutions, which will result in economically stable environments for the entire community. It is our duty and mission of this decade to create a "work ready" applicant pools by providing progressive and innovative programs that truly impact and facilitate change. The neighborhoods high unemployment, general absence of well being and seeming lack of opportunity, dictates a critical necessity for the development of a systematic program reform. Reform of this nature mandates the development of innovative training programs that foster residential participation in emerging industries. The bioscience hub centered at Mission Bay will serve as the catalyst of community inclusion in the biotech industry.

We are faced with the challenges of multiple generations of public assistance and the reality that financial management is not a family or community priority. Our years of experience have taught us that it requires the implementation of an array of components – independent thinking skills, technical training, financial management and innovative training to achieve true self-sufficiency. Facilitating change for productive, self- sufficient environments is the ultimate concern of Young Community Developers. Young Community Developers identifies new horizons in which program efforts are being directed toward development of human potential inherent in residents and families residing in Bayview Hunters Point.

Young Community Developers purposes to create and implement an innovative employment training program that develops resident towards careers as lab techs, Bioworker and bioinformatic assistants. Our primary objective is to provide intensive employment training in these areas and impact worker shortages with community workers. This industry is identified through community focus group meetings and market analysis demonstrates a strong need for trained workers. Given the success over the past four years in similar training programs, YCD is uniquely qualified to implementation this type of project. The primary partnerships for this project are the University of California San Francisco, Catellus and the San Francisco Private Industry Council. This type of training program will provide low-income residents with job training and work experiences that will create a sense of responsibility self-sufficiency.

Young Community Developers, Incorporated

(415) 822-3491 / 1715 Yosemite Avenue San Francisco, CA 94124 / Fax (415) 822-4958

EXECUTIVE SUMMARY

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We are faced with the challenges of multiple generations of public assistance and the reality that financial management is not a family or community priority. Our years of experience have taught us that it requires the implementation of an array of components – independent thinking skills, technical training, financial management and entrepreneurial training to achieve true self sufficiency. Facilitating change for productive, self- sufficient environments is the ultimate concern of Young Community Developers. Young Community Developers identifies new horizons in which program efforts are being directed toward development of human potential inherent in residents and families residing in Bayview Hunters Point.

Young Community Developers purposes to create and implement an innovative employment training program that develops micro-enterprises. Our primary objective is to foster residential ownership and employment training in the area of environmental abatement. This industry is identified through community focus group meetings and market analysis demonstrates a strong need for trained workers and services. Given the success over the past four years in environmental training, YCD is uniquely qualified to implementation this type of enterprise. The primary partnerships for this project are the San Francisco Building and Trades Council, Laborers International Union and the San Francisco Private Industry Council. This type of training program will provide housing authority residents with job training and work experiences that will create a sense of responsibility self-sufficiency and ownership.

PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.
creating
employment
opportunities

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD **DATE:** NOVEMBER 7, 2001

FROM: ANN COCHRANE BB for Ann Cochrane
YOUTH COUNCIL CHAIR

SUBJECT: EIGHT-MONTH FUNDING RECOMMENDATIONS FOR WIA YOUTH SERVICE SUBCONTRACTORS (Action Item 6.a.)

The Workforce Investment Board (WIB) is asked to review and approve staff recommendations for an eight-month continuation of funding for current Workforce Investment Act (WIA) Youth (formula funded) training subcontractors.

Background

This year, San Francisco received a total WIA youth formula allocation of $1,807,547. A strategic budget decision was approved by the Workforce Investment Board at its June 13th meeting to allocate WIA youth formula funds as follows:

- 65% to training and participant support pools (transportation, child care, etc.)
- 35% to the "One Stop San Francisco" System and its infrastructure development (25% allocation will be augmented by up to 10% additional WIA funds); and,
- 10% for PIC Administration (WIA law);

The Executive Committee approved continuation of funding for four months to all current WIA youth subcontractors. The four-month continuation for WIA youth subcontracts was necessary because subcontractors faced a myriad of barriers during the transition from JTPA to the WIA program last year. During the four-month extension period (July1, 2001 – October 31, 2001), performance data for the full twelve-months of the last Program Year (July 1, 2000 – June 30, 2001) was used as a basis for performance evaluation and these funding recommendations for the remainder of the year (November 1, 2001 – June 30, 2002). Performance data includes enrollments, placements and wages retention.

During the month of August 2001, PIC staff identified unspent subcontractor funds from last program year in the amount of $429,635. This amount, added to the current youth allocation, brings the total amount of funds available for funding youth programs for the remaining eight months of this year (November 1, 2001 – June 30, 2002) to $1,185,806. Recommendations for total dollar allocation of these funds are divided equally between in-school and out-of-school programs as required in the San Francisco Strategic Five Year Plan.

Recommendation

In-school programs:

The Youth Council propose funding all in-school subcontractors except Juma Ventures (Juma). Juma has requested a reduction in its participant slot level from six to two for the four-month extension from (July 1, 2001 – October 31, 2001).

Out-of-school programs:

Staff propose funding all out-of-school youth subcontractors except Juma Ventures and The Family School (TFS).

In addition, staff propose allocating $172,000 to a set aside pool to allow subcontractors not recommended for funding to train participants through individual referral contracts. Juma and TFS must meet required enrollment goals for the four-month contract (July1 – October 31, 2001). Staff also propose that this set aside pool be available to all recommended out-of-school youth subcontractors once contractual enrollment goals for contract period ending June 30, 2002 have been met.

The following charts are attached to this memo:

- Attachment 1 – Recommendations
- Attachment 2 – Performance data (July 1, 2001 – June 30, 2001)
- Attachment 2.1 – Performance data of June placements reported in the July monthly report

If you have any questions, please contact Brenda Brown at 415.923.4264. Staff will also be present at the November 14, 2001 meeting to answer questions.

Attachments

cc: PIC Senior staff & Operations staff
WIA formula funded subcontractors

Attachment 1

PY'2001 WIA Youth (July 1, 2001 to June 30, 2002)	4 Months Funding	Participants	8 Months Funding	Participants
Juma Ventures In-School	$ 22,644	6	$ -	0
S.F.League of Urban Gardeners In-School	$ 34,422	3	$ 68,843	7
S.F. Unified School District In-School	$ 93,333	42	$ 186,667	83
Young Community Developers-In School	$ 33,589	8	$ 184,011	42
Participant Support Pool			*$ 153,382*	
Sub-Total	$ 183,988	59	$ 592,903	132
Asian Nieghborhood Out of School	$ 20,800	4	$ 83,200	16
Jewish Vocational Service Out of School	$ 30,375	13	$ 15,188	7
Juma Ventures Out of School	$ 6,667	2	$ -	0
Mission Hiring Hall Out of School	$ 22,500	4	$ 90,000	16
Mission Lang.& Voc.School Out of School	$ 28,620	10	$ 71,550	25
The Family School Out of School	$ 39,139	12	$ -	0
Participant Support Pool	*$ 30,665*		*$ 160,000*	
Individual Referrals			*$ 172,965*	
Sub-Total	$ 178,766	45	$ 592,903	64
Total	$ 362,754	104	$ 1,185,806	196

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		%		%
In-School	$ 183,988	51%	$ 592,903	50%
Out-of-School	$ 178,766	49%	$ 592,903	50%

Attachment 2

Workforce Investment Act Youth Subcontractors Year One (Twelve Months)Performance: Program Year 00-01 (July 1, 2000 to June 30, 2001)

Subcontractors	Description	Subcontract Amount	Enrollment as of 06/30/01			Placement as of 06/30/01		
			Plan	Actual	%	Plan	Actual	%
Juma Ventures	In-School	$67,931	17	3	18%	12	0	0%
S.F. League of Urban Gardeners	In-School	$103,265	10	5	50%	0	0	0%
S.F. Unified School District/STEP	In-School	$280,000	125	110	88%	0	0	0%
Young Community Developers	In-School	$100,767	23	22	96%	12	0	0%
Asian Neighborhood Design	Out-of-School	$62,400	12	9	75%	6	1	17%
Jewish Vocational Service	Out-of-School	$91,126	40	8	20%	30	0	0%
Juma Ventures	Out-of-School	$20,000	5	1	20%	5	0	0%
Mission Hiring Hall	Out-of-School	$67,500	11	10	91%	6	0	0%
Mission Lang.&Voc.School	Out-of-School	$85,860	30	18	60%	22	9	41%
The Family School	Out-of-School	$117,417	37	3	8%	18	0	0%
	Total	$996,266	310	189	61%	111	10	9%

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Attachment 2.1

Workforce Investment Act Youth Subcontractors
Year One (Thirteen Months) Performance:
July 1, 2000 to July 2001

Subcontractors	Description	Subcontract Amount	Enrollment as of 07/31/01			Placement as of 07/31/01		
			Plan	Actual	%	Plan	Actual	%
Juma Ventures	In-School	$67,931	17	3	18%	12	0	0%
S.F. League of Urban Gardeners	In-School	$103,265	10	5	50%	0	0	0%
S.F. Unified School District/STEP	In-School	$280,000	125	125	100%	0	0	0%
Young Community Developers	In-School	$100,767	23	22	96%	12	0	0%
Asian Neighborhood Design	Out-of-School	$62,400	12	9	75%	6	1	17%
Jewish Vocational Service	Out-of-School	$91,126	40	8	20%	30	0	0%
Juma Ventures	Out-of-School	$20,000	5	1	20%	5	0	0%
Mission Hiring Hall	Out-of-School	$67,500	11	10	91%	6	0	0%
Mission Lang.&Voc.School	Out-of-School	$85,860	30	18	60%	22	10	45%
The Family School	Out-of-School	$117,417	37	3	8%	18	0	0%
	Total	$996,266	310	204	66%	111	11	10%

FN:WIAYOUTH 9/12/2001 14:30

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD **DATE:** NOVEMBER 7, 2001

FROM: ANN COCHRANE BB for Ann Cochrane
YOUTH COUNCIL CHAIR

SUBJECT: EXPANDING WIA TITLE IB ELIGIBILITY CRITERIA TO SERVE YOUTH WHO DO NOT MEET THE LOW INCOME REQUIREMENT **(Agenda Item 7)**

The Youth Council requests Workforce Investment Board (WIB) ratification of the recommendation to adopt a local "Five Percent Window" to permit WIA enrollment of youth who are not low income.

Background

To be eligible to receive youth services, an individual is usually requested to meet WIA low-income criteria. However, the Youth Council is permitted, and does recommend to the WIB that five percent (5%) of participants served by WIA Youth programs be individuals who do not meet the income criteria if such individuals are within one or more of the following categories as stated in the current San Francisco Strategic Five-Year Plan:

1. Is not less than age 14 and not more than age 21;
2. Is a Low Income individual; and
3. Is an individual who is one or more of the following:
    a. Deficient in basic literacy skills;
    b. A school dropout;
    c. Homeless, a runaway, or a foster child;
    d. Pregnant or a parent;
    e. An offender; or
    f. An individual who requires additional assistance to complete an educational program, or to secure and hold employment.

Subsection f, "additional assistance" is defined in the Five-Year Plan as follows: "'an individual who requires additional assistance to complete an educated program, or to secure and hold employment' means persons (aged 14 to 21 years) who require supportive services and/or longer term education and skill training due to multiple barriers to employment, including: enrollment in special education, school dropouts, students maintaining less than a "C" average, truants, persons with Limited English Proficiency, persons with disabilities and sensory impairments, offenders, single parents, non-custodial parents, pregnant women, persons with substance abuse and alcohol problems, and homeless persons."

Recommendation

The Youth Council recommends that the WIB ratify the expansion of the WIA Title IB Youth eligibility criteria to include:

a. Youth residing in public housing developments or Section 8 housing;
b. Emancipated minors;
c. Court agency referrals with mandated school attendance; and
d. For older youth (18-21): Have never held a job or have never held a full-time job more than thirteen consecutive weeks.

If you have any questions, please feel free to contact Brenda Brown at 415.923.4264. Staff will also be present at the November 14, 2001 meeting to answer questions.

cc: PIC staff & Operations staff
WIA Formula Youth funded subcontractors

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Workforce Investment San Francisco
Local Workforce Investment Board
2002 Meeting Dates

Wednesday, January 16, 2002

9:30 a.m. – 11:30 a.m.

UCSF, Laurel Heights Campus
3333 California Street
Garden Room

◆

Wednesday, March 20, 2002

9:30 a.m. – 11:30 a.m.

Yerba Buena Center for the Arts
701 Mission Street
Forum

◆

Wednesday, May 15, 2002

9:30 a.m. – 11:30 a.m.

SBC Pacific Bell
370 Third Street
Parnassus Hall

◆

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Wednesday, June 19, 2002

9:30 a.m. – 11:30 a.m.

Yerba Buena Center for the Arts
701 Mission Street
Forum

◆

Wednesday, September 18, 2002

9:30 a.m. – 11:30 a.m.

Location: **TBA**

◆

Wednesday, November 20, 2002

9:30 a.m. – 11:30 a.m.

Yerba Buena Center for the Arts
701 Mission Street
Forum

Rev. 4/22/02

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

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Date: Wednesday, January 16, 2002
Time: 9:30 a.m. – 11:30 a.m.
Location: UCSF, Laurel Heights Campus
3333 California Street
Garden Room
San Francisco, CA 94143

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below.

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at *www.ci.sf.ca.us/infoctr/sunshine/index.htm*

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: Wednesday, January 9, 2002

*745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org*

*1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)*

WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD
PROPOSED AGENDA

Agenda Item	Presenter	Time
1. Adoption of the Agenda *(Action Item)*	Lynn Bunim, Chair	TBA
2. Public Testimony on Agenda Items *(Discussion Item)*	Lynn Bunim, Chair	TBA
3. Approval of the Minutes for November 14, 2001 Meeting *(Action Item)***	Lynn Bunim, Chair	TBA
4. Presentation(s)	TBA	TBA
5. Consent Calendar *(Action Item)* a. Proposed Action: Ratification of acquisition of Lifeprint Resource Library* b. Proposed Action: Ratification of Youth RFP/RFQ*** c. Proposed Action: Ratification of LMI Contract 2002* d. Proposed Action: Ratification of Memorandum of Understanding between Mandatory One Stop Partners and the Workforce Investment Board* e. Proposed Action: Ratification of Memorandum of Understanding between One Stop Operator Consortium and the Workforce Investment Board* f. Proposed Action: Ratification of Consortium Governance Agreement*	Pamela Calloway	TBA
6. Executive Committee Recommendation *(Action Item)* a. Proposed Action: Ratification of Refugee Funding Recommendations*	Trent Rhorer or Leslie Luttgens	TBA
7. Chair's Report *(Discussion Item)*	Lynn Bunim, Chair	TBA
8. President's Report *(Discussion Item)*		TBA
9. Public Testimony on Non-Agenda Items *(Discussion Item)*	Lynn Bunim, Chair	TBA
10. Future Agenda Items *(Discussion Item)*	Lynn Bunim, Chair	TBA

**Information enclosed.*
***Information to be sent at a later date.*
****Additional information to be sent at a later date.*

DIRECTIONS TO 3333 CALIFORNIA STREET

PUBLIC TRANSPORTATION:

The UCSF, Laurel Heights Campus, located between Laurel and Sacramento Streets, is accessible by Muni. Muni buses that stop by the campus are #1, # 2, # 3, # 4, and # 43. For more Muni Information, please call (415) 673 6864.

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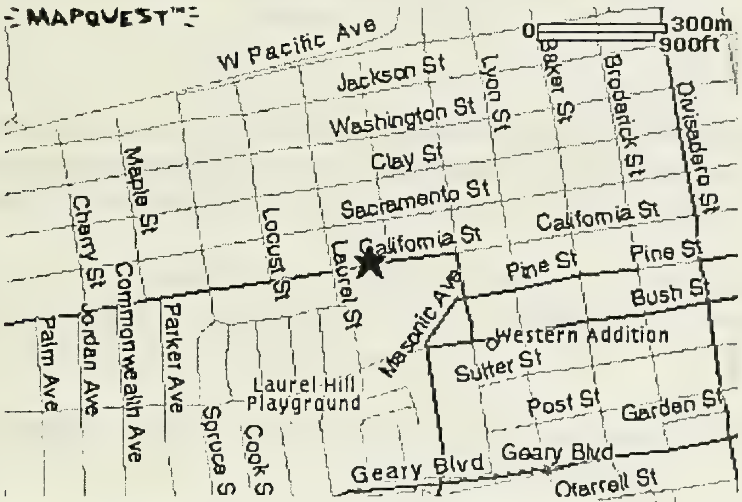
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Maple St
Cherry St
Locust St
Laurel St
Commonwealth Ave
Masonic Ave
Western Addition
Sutter St
Palm Ave
Jordan Ave
Parker Ave
Laurel Hill Playground
Spruce S
Cook S
Post St
Garden St
Geary Blvd
Geary Blvd
O'farrell St

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Driving Directions:

FROM THE NORTH BAY:

Drive south on US Highway 101 across Golden Gate Bridge. Take 19th Ave./Presidio Ave. to Lake Street. Turn right at Lake and go one half block to 14th Ave. Turn left on 14th Ave. to California Street. Turn left on California. Take California to Walnut Street. Turn right on Walnut into 3333 California. Public Parking Lot to your left.

FROM THE EAST BAY:

Drive across the San Francisco/Oakland Bay Bridge and follow Highway 101(South) to the Mission Street/Fell exit. Take the Fell Street exit. Stay on Fell Street to Masonic Ave. Turn right onto Masonic to Euclid Street. Turn right onto Euclid, go one block to Presidio Ave. Turn left onto Presidio, go one block to California Street. Turn left onto California, go one block to Walnut Street. Turn left on Walnut into 3333 California Street. Public Parking Lot to your left.

FROM THE SOUTH BAY:

From San Francisco International Airport (SFO): (1) Take Highway 101 north and follow the Golden Gate Bridge sign to Civic Center/Mission Street/Fell Street. Take Fell Street to Masonic Ave. Turn right onto Masonic Ave. Stay on Masonic to Euclid Street. Turn right onto Euclid go one block to Presidio Ave., turn left onto Presidio, go one block to California Street and turn left. Go one block to Walnut Street. Turn left on Walnut into 3333 California; or (2) Take Highway 380 to 280 (heading towards SF/Daly City). Stay on 280 to 19th Avenue exit. Stay on 19th Ave. to California Street. Turn right on California to Walnut Street. Turn right on Walnut into 3333 California. Public Parking Lot to your left.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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RESOLUTION
of the
Executive Committee
of the
Workforce Investment San Francisco Board
January 8, 2002

WHEREAS, LifePrint, Inc., a non-profit corporation engaged in the business of providing out-placement services and job search services to recently dislocated workers, ceased operation during the fourth quarter, 2001; and

WHEREAS, Kathye Citron, President of LifePrint is a member of the Board of Workforce Investment San Francisco, the Local Workforce Investment Board for the City and County of San Francisco; and

WHEREAS, the dissolution of LifePrint, Inc. includes the liquidation of its assets; and

WHEREAS, the assets of LifePrint include a Resource Library comprised of more than 2000 books and periodicals; and

WHEREAS, the Private Industry Council, Inc. is subgrant recipient of Workforce Investment Act (WIA) allocations on behalf of the City and County of San Francisco and has responsibility for administration of WIA funds in San Francisco; and

WHEREAS, Pamela S. Calloway is the President of the San Francisco Private Industry Council, Inc.; and

WHEREAS, One Stop San Francisco, the One Stop System in San Francisco, is governed and administered by the Workforce Investment San Francisco Board, and may be interested in acquiring the LifePrint Resource Library with WIA resources.

NOW THEREFORE BE IT RESOLVED THAT, Kathye Citron is recused from any deliberation of the acquisition of the LifePrint Resource Library by the Workforce Investment Board and any of its Committees;

BE IT ALSO RESOLVED THAT, Pamela Calloway is authorized to negotiate the acquisition of the LifePrint Resource Library on behalf of the One Stop San Francisco System; and

BE IF FINALLY RESOLVED THAT, Ms. Calloway is only authorized to pay fair market value, or less, for the acquisition of the LifePrint Resource Library and that an independent valuation of the asset must be a part of the records of the Workforce Investment San Francisco Board prior to the acquisition of the LifePrint Resource Library.

Lynn Bunim
Lynn Bunim 1/8/02
Chair

Alice Chiu
Alice Chiu 1/8/02
Secretary

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD
MAYOR WILLIE L. BROWN, JR.

DATE: JANUARY 9, 2002

FROM: LESLIE LUTTGENS, VICE CHAIR

SUBJECT: LABOR MARKET INFORMATION CONTRACT FOR 2002

RECOMMENDATION

On December 14, 2001, the Executive Committee of the Workforce Investment San Francisco Board approved entering into a contract for the year 2002 with the Labor Market Information Division (LMID) of the Employment Development Department (EDD) in the amount of $58,130. The Workforce Investment Board and Mayor Willie L. Brown, Jr. are asked to ratify this recommendation.

BACKGROUND

For the past twelve years the PIC has participated with the LMID through an annual contract to collect and report data from local employers on approximately 25 selected occupations. These data are then published in the Occupational Outlook Report and used by the LMID for their state data tabulations for other purposes as well. Copies of the report are distributed to employers, employment and training providers, vocational rehabilitation counselors, career counselors, school counselors, as well as those agency staff working with public assistance recipients.

Because the data are collected from local employers in San Francisco, it provides the PIC staff working with dislocated/laid off workers with valuable information regarding the likelihood of an individual returning to work in a particular occupation. The PIC has continued with the LMID contract even though it does not cover all of the expenses of collecting these data. The PIC has used other funding sources to cover those costs, primarily Workforce Investment Act (WIA) Rapid Response funds.

cc: PIC staff

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WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

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MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD
MAYOR WILLIE L. BROWN, JR.

DATE: JANUARY 8, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: PROPOSED AGREEMENTS FOR THE ONE STOP SANFRANCISCO (ACTION ITEM)

Recommendation

Today, the Executive Committee approved each of the attached agreements for One Stop San Francisco System and is now asking for approvals of them from the Board and Mayor Brown.

Background

Funded by a grant from the San Francisco Foundation, Jonathan D. Barbieri & Associates has been working for the past year with many levels of the One Stop partner organizations in clarifying the details of the delivery system and formalizing an effective governance structure. Through a series of working meetings with the mandatory One Stop partners, JDB & Associates has assisted the partnership in working towards collectively coming to an understanding on how the One Stop system can be supported by the available resources while providing quality services to all customers, individuals and business alike.

At the December 5th meeting, the One Stop Committee reviewed and discussed the proposed Memorandum of Understanding presented by Jonathan Barnieri on behalf of the One Stop partners. In doing so, Mr. Barbieri emphasized that these formal agreements create a starting point for the development of the WIA workforce delivery system. They are not the final vision for the system or a comprehensive means of operations but instead, a place to begin. The immediate goal is to submit these more fully developed MOU's (Memorandum of Understanding) to the State, and to move forward with the complaint delivery of services while using the agreements as guidelines. A Resource Sharing Agreement describing the cost of sharing for support of the system is currently being developed and will be attached to the Partner/WIB MOU at a future date.

Mr. Barbieri also advised that the One Stop Committee and the Board should consider reviewing these agreements on a regular basis.

Please contact Cathy deCristofaro at 415.923.4268 if you have questions or concerns. Staff will also be available at the meeting to answer any questions that you might have.

Attachments

cc: JDB & Associates
PIC Executive Staff

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
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ACTIVITY LOG FOR ONE STOP S FRANCISCO MOU DEVELOPMENT

DATE	ACTIVITY
January	• PIC receives grant from S.F. Foundation for One Stop Partnership Building • Request for Proposal begins solicitation for consultants
February	• Entrance conference with successful proponent firm • Orientation to local system, including a series of site visits
March	• Consultants and staff convene meeting with mandatory One Stop partners • Consultants conduct one-on-one interviews with partners • Consultants meet with Chair of new Workforce Investment Board
April	• All-day intensive workshop to develop recommendations for system design • Consultants present partner recommendations to the One stop Committee of the WIB
May	• Consultants facilitate refining of recommendations with One Stop Committee • Meeting with partners to refine MOU's • One Stop Committee votes to approve recommendations from design and budget for One Stop system
June	• Executive Committee and full WIB vote to approve One Stop Committee recommendations
July	• First quarterly meeting of the potential Consortium members and consultants • Cost Allocation and Resource Sharing meeting with fiscal agents for Consortium present
August	• One Stop Committee approves draft 'conceptual budget' for One Stop Center compliance
September	• Revised MOU draft re-distributed to partners for review • Consultants meet with partners to review MOU modifications • Also meet with Consortium members to review Consortium/WIB agreement and Governance Agreement
October	• Executive Committee and full WIB approves 'conceptual budget' for One Stop Center compliance • PIC legal counsel to review MOU's
November	• PIC to complete review and respond to consultants • Consultants to make final adjustments to MOU's & re-distribute to partners for individual agency approval • Second quarterly meeting of potential Consortium Directors • One Stop staff to draft and present Operations Charter to Consortium
December	• Consultants to present partner MOU's and Consortium/WIB agreements to One Stop Committee • Committee reviews and approves all proposed formal agreements presented

Memorandum of Understanding
One Stop San Francisco

I. References

Workforce Investment Act of 1998 (Act)
- Workforce Investment San Francisco Board [Section 117(a) of the Act]
- One-Stop San Francisco [Section 121of the Act]
- Full Service One-Stop Center [Section 134(c)(2)(A), Final Rule 662.100, Subsections (c), (d), and (e)]
- Full Service One-Stop Center signatory partners [Section 121(b)(1), Final Rule 662.230-66.260]
- One-Stop Operator Consortium [Designation of the Operator: Section 117 (d)(2)(A); Selection Process: Section 121(d)(2) and (e); Final Rule 662.420]

II. Introduction

This MOU is entered into in the spirit of cooperation and collaboration by the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board, hereafter referred to as "WISF Board", and the Full Service One-Stop Center signatory partners, hereafter referred to as "partners", to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers/businesses, through an integrated system of service delivery operated at one comprehensive site located at 3120 Mission Street, called the Full Service One-Stop Center, hereafter referred to as the "Center", and 40-plus satellite sites. It is understood that the development and implementation of the Full Service One-Stop Center will require mutual trust and teamwork between the partner agencies, all working together to accomplish shared goals, including customer satisfaction.

III. Strategic Vision for One-Stop San Francisco

The vision for One-Stop San Francisco, hereafter referred to as the "System", is to integrate current services in the Center and satellite sites to move toward providing universal access to career and labor market information and to provide other useful consumer information regarding training and education that enables the customers to make better informed choices.

IV. Services to be Provided At or Through the Full Service One-Stop Center

The following are the services that will be delivered at or through the Center. Additional matrices of services to be provided at the satellites are being developed and will be incorporated into this document as an addendum at a later date. The method for service delivery, the agency responsible for delivering those services, and the various funding resources that each will bring to the operation are listed below:

Core Service	Method for Service Delivery?	Service Provider	Funding Source
1. Determination of eligibility to receive assistance under Title I of WIA			
2. Outreach, intake, and orientation			
3. Initial assessment			
4. Job search and placement assistance, career counseling where appropriate			
5. Labor Market Information			
6. Provision of program performance information and program cost information			
7. Information on the performance of the local area and the One-Stop delivery system			
8. Information on the availability of supportive services in the local area and referral to such services as needed			
9. Information on and assistance in filing UI claims			
10. Assistance in establishing eligibility for WtW activities and financial aid assistance for other training and education programs available in the local area			
11. Follow-up services for 12 months for individuals participating in Title I funded activities placed in unsubsidized employment			

Partner Identified Core Services	Method for Service Delivery?	Service Provider	Funding Source
1.			
2.			
3.			

Intensive Services May include the following:	Method for Service Delivery?	Service Provider	Funding Source
1. Comprehensive and specialized assessment			
2. Development of an individual employment plan			
3. Group counseling			
4. Individual counseling and career planning			
5. Case management for participants seeking training services			
6. Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training			
Partner Identified Intensive Services	**Method for Service Delivery?**	**Service Provider**	**Funding Source**

Training Services May include:	Method for Service Delivery?	Service Provider	Funding Source
1. Occupational skills training			
2. On-the-job training			
3. Programs that combine workplace training with related instruction, which may include cooperative education programs			
4. Training programs operated by the private sector			
5. Skill upgrading and retraining			
6. Entrepreneurial training			
7. Job readiness training			
8. Adult education and literacy activities provided in combination with services described in numbers 1-7 above			
9. *Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training			
Partner Identified Training Services	**Method for Service Delivery?**	**Service Provider**	**Funding Source**

* Include competitive grants such as H-1B and W-t-W.

V. Referral Process

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

   1. Receive a written referral form with the date, time, reason for, and place of the appointment.
   2. Receive scheduling for an appointment within three working days from the date of the referral.

B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

VI. Cost Allocation and Shared Costs

1. A cost allocation plan for the Full Service One Stop Center will be negotiated and developed in accordance with the Act as well as with OMB circulars A-21, A-87, A-110, ASMB C-10, and other Federal and State guidance as appropriate.
2. Plan(s) for cost allocation will be reviewed periodically and discussed between all parties. Modifications to the plan must be mutually agreed to in writing.
3. The parties agree that joint application on behalf of the Center which result in an award, will benefit the Center overall and not the respective entity or entities applying for funds.

VII. Full Service One-Stop Center Performance Criteria

This MOU is an opportunity to provide guidance and direction to the partners. By including minimum levels of performance, the MOU becomes the vehicle through which the partners will be able to jointly monitor services against stated goals and performance measures to promote continuous improvement. One of the goals of the Act is to achieve mutually shared outcomes of those participants who receive services by multiple partners.

Therefore, it is agreed that the Center partners will strive to achieve the following standard of quality service for its customers, employees, and partners.

All customers will receive:

- ☐ Prompt and courteous service from the staff.
- ☐ Services designed to assist customers (both jobseekers and employers) in achieving their educational and/or employment goals.

All employees can expect to:

- ☐ Work in a safe and professional environment.
- ☐ Receive the tools necessary to achieve the desired outcome for their customers.

VIII. Governance of the One-Stop San Francisco

The accountability and responsibility for One-Stop San Francisco rests with the WISF Board. Accountability and responsibility for the organizational processes, services, and accomplishments for the Center will rest with the WISF Board, the One-Stop Operator Consortium, and the partners.

The WISF Board, in partnership with the Mayor of San Francisco, is responsible for setting policy for the portion of the statewide workforce investment system within One Stop San Francisco. This System includes the Full Service One-Stop Center, satellites, and any electronic or physical sites that provide information for services for access to workforce development activities within the San Francisco Workforce Investment Area. In addition, the WISF Board's responsibilities are to:

1. Develop and submit a local plan.
2. Select the One-Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998, Section 117 (d)(2)(A); Final Rule Section 662.410.
3. Develop a budget for the purpose of carrying out the duties of the WISF Board.
4. Conduct oversight with respect to local programs of youth activities authorized under section 129, local employment and training activities authorized under section 134, and the local Workforce Investment System.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One-Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One-Stop San Francisco.
11. Collaborate with the One-Stop Operator Consortium in developing and maintaining the One-Stop San Francisco technology links.

The One-Stop Committee, as a standing committee of the WISF Board, will recommend policy to the WISF Board regarding operations and delivery of services through the Center.

The One-Stop Operator Consortiums' responsibilities are limited to the Center and include:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes; including customer satisfaction outcomes for both employers and job-seekers;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board,
9. Providing recommendations for Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.
18. Ensuring that reasonable efforts will be made to insure the safety and security of all customers and staff.

The Partner responsibilities will be to:

☐ Provide services as outlined in this MOU and to coordinate and cooperate with the One-Stop Operator Consortium in the day-to-day delivery of services at the Center and with PIC, Inc. for the required administrative activities within the One Stop San Francisco.

IX. Agreements

It is mutually agreed and understood by and between the parties that:

1. This MOU is neither a fiscal nor a fund obligation document. Specific studies, activities, programs or projects that involve the transfer or expenditure by any party of any money, services, or property will require execution of separate agreements or contracts. Each subsequent agreement or arrangement involving

the transfer of money, services or property between the parties to this MOU must comply with all applicable statutes and regulations.

2. This MOU shall be governed by and construed in accordance with the laws of the federal government and the State of California and shall also be governed by the laws of the City and County of San Francisco and the policies of the WISF Board.
3. During the performance of the MOU, the parties shall not discriminate against any person because of age, race, color, religious or political affiliation, sex, national origin, ancestry, physical or mental disability, medical condition, marital status, veteran, or sexual orientation. The parties also agree to abide by the provision of Executive Order 11246 on nondiscrimination and, accordingly, will take affirmative action to ensure that applicants are employed without regard to their age, race, ancestry, creed, color, religious or political affiliation, sex, physical or mental disability, medical condition, national origin, sexual orientation or marital status.
4. The partners agree that policies and procedures established under this MOU and programs and services provided at the Center will comply with the Americans with Disability Act.
5. This MOU in no way restricts any of the parties from participating in similar activities or arrangements with other public or private agencies, organizations or individuals.
6. Parties may place WISF Board approved signage on the Center exterior to identify partner presence. The parties agree to utilize the One Stop San Francisco logo on the building identified for Center usage, letterhead, envelopes, business cards, and any written correspondence and fax transmittals as appropriate. A list of all participating partners will be posted prominently at each site respectively.
7. Parties agree to utilize, to the maximum extent possible, CalJOBS, the State Labor Exchange, as an electronic job matching system within the One Stop San Francisco.

X. Independent Agency Status

It is expressly understood and agreed that this MOU is not intended and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture or association between parties. Each party will be responsible for providing its own salaries, payroll taxes, withholding, insurance, workers' compensation coverage and other benefits of any kind, as required by law, for its own employees. Individual contracts and agreements between partners are not affected by and do not affect this MOU.

XI. Method for Dispute Resolution

The parties agree to try to resolve policy or practice disputes at the lowest level starting with the staff supervisor. If issues cannot be resolved at this level, they shall be referred to the Center Manager and respective staff employer for discussion and resolution. If issues cannot be resolved at this level, they shall be referred to the One-Stop Operator Consortium for discussion and resolution. If issues cannot be resolved at this level, a third party dispute resolution specialist may be called in to help mediate any disputes.

Informal mediation services, however, shall be explored prior to any other formal or legal process. Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

The parties agree to recognize and comply with applicable labor agreements affecting represented employees located in the Center and satellite sites. This shall include the right of access by labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.39 [commencing with section 3512] of Division 4 of Title I of the Government Code).

The One Stop Operator Consortium and the partners shall cooperate as appropriate and according to partner procedures in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning partner employees and partner employee misconduct.

If the methods described above fail to result in a resolution, the parties involved in the dispute shall first seek mediation, and as a final method, seek arbitration services at the expense of the respective parties.

XII. Confidentiality

It is the intention of the partners to develop systems to share information throughout One Stop San Francisco. In the initial stages, client information will be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of applicable state and federal laws and regulations.

XIII. Termination

The parties understand that implementation of the MOU is dependent on everyone's good faith effort to work together to improve services to the community. The parties also agree that this is a project where different ways of working together and providing services are being tried. In the event that it becomes necessary for one or more parties to cease being a party to this MOU, that said party(ies) shall notify all other parties, in writing, ninety (90) days in advance of that intention. The other parties shall then determine how to replace or offset the loss of participation and resources to the Center. Termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

XIV. Insurance

Each party hereto acknowledges and understands that the State of California has elected to be insured for its general liability through a self-insurance program. Departments of the State of California are covered by a self-insurance plan for general liability administered by the State Attorney General's Office. All other parties agree to maintain in full force and effect during the term of the MOU and any extension thereof, commercial general liability insurance, or self-insurance, with limits of not less than $1,000,000 single limit coverage per occurrence for bodily injury, personal injury and property damage. Upon request from any other party, a party shall provide an appropriate certificate evidencing such insurance, or self-insurance, to the requesting party.

XV. Site Supervision

The Center Manager will be accountable and responsible to the One Stop Operator Consortium for the day-to-day operation and coordination of services and partner staff assigned to the Center. The Center Manager may have lead responsibility over partner staff, to the extent of assigning and reviewing work.

Partner staff that is located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil service or other employment rights and responsibilities. Partner staff, including state employees, performing services at the Center and satellites shall retain existing personnel, civil service and collective bargaining protections on matters related to employment, including but not limited to, hiring, promotion, discipline, and grievance procedures.

XVI. Hours of Operation

The minimum hours of operation of the Center will be Monday through Friday, 8:00 a.m. to 5:00 p.m. All staff will comply with the holiday schedule of their primary employer and will provide a copy of their holiday schedule to the Center Manager at the beginning of each calendar year.

XVII. Duration and Modification of the MOU

The partners agree that the terms of the MOU will take effect upon signature of both parties and will continue in effect until June 30, 2003, or such time as any partner or partners will modify, extend, or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. All partners agree in writing to its termination; or
2. One of the partners receives written notification of termination from another partner.

This MOU may be reviewed and renewed annually and modified, altered, or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties. Ratification of the request by all the other partners will constitute the modification in question. This MOU constitutes the entire agreement between the parties hereto and no oral understanding not incorporated herein shall be binding on any of the parties hereto.

Memorandum of Understanding
One Stop San Francisco

SIGNATURES

In WITNESS THEREOF, the parties to this MOU execute this agreement.

Dated: ________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
Willie L. Brown, Jr.
Mayor

____
City and County of San Francisco

____
1 Dr. Carlton B. Goodlett Place, Room 200

____
San Francisco, CA 94102-4681

____
(Legal Name of Party)

Dated: ________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
Lynn Bunim,
Chairperson, WISF Board

____
Workforce Investment San Francisco Board

____
745 Franklin Street, Suite 200

____
San Francisco, CA 94102

____
(Legal Name of Party)

Memorandum of Understanding
One Stop San Francisco

Dated: _________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
(Name and Title of Authorized Officer)

____
(Agency or Organization)

____
(Address)

____
(City, State, Zip Code)

____
(Legal Name of Party)

WORKFORCE INVESTMENT SAN FRANCISCO BOARD
ONE STOP OPERATOR CONSORTIUM

MEMORANDUM OF UNDERSTANDING

I. PARTIES

This memorandum is by and between the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board (hereinafter WISF Board) and the One Stop Operator Consortium, consisting of the following five entities (hereinafter referenced collectively as the Consortium):

- San Francisco Department of Human Services,
- Employment Development Department,
- City College of San Francisco,
- National Council on Aging, and
- Private Industry Council, Inc.

II. PURPOSE

The parties agree to enter into this Memorandum of Understanding (MOU) for the purpose of creating a One Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998 (Act) Section 121(d)(2)(A)(ii) to operate as a "single service delivery system" under the Act. The exclusive purpose of the Consortium is to manage the Full Service One Stop Center at 3120 Mission Street as required under subsection 134 (c)(2)(A) of the Act. The Consortium agrees to and certifies to the WISF Board and the Mayor that the requirements in Section 121(d) and Section 134(c) of the Act will be satisfied. The parties make the commitment to implement and maintain not only the basic provisions of the Act, but also to enact the basic guiding principles of California's One Stop delivery system. These State Principles are as follows:

- Integrated: offering as many employment, training, and education services as possible for unified customer service;
- Comprehensive: offering its primary customers – employers and job, education, and training seekers – an array of useful information and wide and easy access to needed services;
- Customer Focused: providing a means for customers to judge the quality of these services in order to support informed choice; and
- Performance Based: identify clear outcomes and methods, including customer satisfaction, for measuring the agreed-upon outcomes.

III. APPROVAL

This MOU is of no final force or effect until signed by the Mayor of the City and County of San Francisco, the WISF Board Chair and by representatives of the Consortium who have united to become the One Stop Operator Consortium as defined in the WIA, Section 121(d), for the Full Service One Stop Center (hereafter referred to as Center) located at 3120 Mission Street.

IV. ONE STOP SAN FRANCISCO

A. In terms of service locations, the One Stop service delivery system in San Francisco consists of one Full Service One Stop Center currently located at 3120 Mission Street and over forty (40) Satellites.

B. At a minimum, the One Stop Operator Consortium commits to maintaining the 3120 Mission Street facility as a comprehensive, Full Service One Stop Center as defined in the WIA, Section 134.

C. The Private Industry Council of San Francisco, Inc., as agent of the partnership between the WISF Board and the Mayor of the City and County of San Francisco (CLEO) is the sub-grant recipient of Workforce Investment Act formula funds for the City and County of San Francisco and is the System Administrator for One Stop San Francisco.

D. San Francisco Department of Human Services, on behalf of the Consortium, is responsible for managing Workforce Investment Act funds budgeted for compliant operation of the Full Service One Stop Center.

V. CORE MANDATORY SERVICES

A. Workforce Investment Act funds for local employment and training activities, in general, and consistent with the Act for funds allocated to a local area for adults, or as appropriate, funds allocated to the local area for dislocated workers and youth, shall be used for:

1. Core Services: The establishment of a One Stop delivery system (at a minimum one physical location) to provide core services, to provide access to intensive and training services as prescribed in the Act, including serving as a point of access to individual training accounts and other training services. Core Services are defined as:

    i. Determinations of whether the individuals are eligible to receive assistance under Title I of WIA;

    ii. Outreach, intake (which may include worker profiling), and orientation to the information and other services available through the One Stop delivery system;

    iii. Initial assessment of skill levels, aptitudes, abilities, and supportive service needs;

    iv. Job search and placement assistance, and where appropriate, career counseling;

v. Provision of employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas:

   1. Job vacancy listings in such labor market areas,
   2. Information on job skills necessary to obtain the jobs within such labor market areas, and
   3. Information relating to local occupations in demand and the earnings and skill requirements for such occupations.

vi. Provision of performance information and program cost information on eligible providers of training services and eligible providers of youth activities, providers of adult education, providers of postsecondary vocational education activities and vocational education activities under the Carl D. Perkins Vocational and Technology Education Act, and providers of vocational rehabilitation activities in Title I of the Rehabilitation Act of 1973;

vii. Provision of information regarding how the local area is performing on the local performance measures and any additional performance information with respect to the One Stop delivery system in the local area;

viii. Provision of accurate information relating to the availability of supportive services, and referral to such services as appropriate;

ix. Provision of information regarding filing claims for unemployment;

x. Assistance in establishing eligibility for Welfare-to-Work activities and financial aid assistance for training and education programs not funded under the Act;

xi. Follow-up services, including counseling regarding the workplace, for not less than 12 months after the first day of employment or program completion, as appropriate.

B. The One Stop Operator Consortium is responsible for assuring access to and the coordination of core services at the Full Service One Stop Center as described above. The Consortium members may provide core services either as individual agencies, collectively as a Consortium, by contract, by agreement or assignment to partnering agencies, with the concurrence and approval of the WISF Board.

C. Additional contracted core services may be arranged per the approval and contract authority of the WISF Board. The One Stop Operator Consortium may recommend such contracted services as appropriate.

D. The One Stop Operator Consortium seeks to reduce or eliminate duplication of services, coordinates and assures the integration of services to the extent possible, in bringing together partnering (One Stop delivery system partners mandated under the Act) resources of program, staff, and/or funding, to provide operations as a single service delivery system as required under the Act.

E. Services shall be focused on two main customer groups, job seekers and employers/businesses, and shall be available at or through the Full Service One Stop Center at 3120 Mission Street.

VI. PERFORMANCE CRITERIA

A. For those services provided at the 3120 Mission Street Center, the One Stop Operator Consortium and System Administrator shall collect and report to the WISF Board indicators of performance for employment and training activities authorized under Section 134 of the Act (except for self-service and informational activities) and for youth activities authorized under Section 129. These measures shall minimally comply with Section 136(b) of the Act and consist of specific indices required by either the Department of Labor or the State Workforce Investment Board and are understood at this time to be as follows:

1. Core Performance Indicators – Adults and Eligible Youth:
    a. Entry into unsubsidized employment;
    b. Retention in unsubsidized employment 6 months after entry into employment;
    c. Earnings received in unsubsidized employment 6 months after entry into the employment, and
    d. Attainment of a recognized credential relating to achievement of educational skills, which may include attainment of a secondary school diploma or its recognized equivalent, or occupational skills, by participants who enter unsubsidized employment, or by participants who are eligible youth age 19 through 21 who enter postsecondary education, advanced training, or unsubsidized employment.

2. Core Performance Indicators – Youth
    a. Attainment of basic skills and, as appropriate, work readiness or occupational skills;
    b. Attainment of secondary school diplomas and their recognized equivalents; and

c. Placement and retention in postsecondary education or advanced training, or placement and retention in military service, employment, or qualified apprenticeships.

3. Customer Satisfaction Indicators:

a. The customer satisfaction indicators of performance shall consist of measures for both employers and participants/job and training seekers.

B. Final mandatory performance benchmarks for the San Francisco Workforce Investment Area are set annually through separate State/WISF Board/CLEO negotiations. The current negotiated standards are included as Attachment A to this MOU; the Attachment will be updated annually to include the current negotiated standards.

C. Additional Performance Indicators: The WISF Board may identify and require reporting on additional indicators of performance for workforce investment activities. Such indicators may be incorporated in other relevant agreements with the One Stop Operator Consortium or added to the MOU through a modification per Section XV.

D. The WISF Board shall evaluate the performance of the One Stop Operator Consortium no less than semi-annually, with such evaluation taking into consideration the performance indicators identified in this Section.

VII. UNIVERSAL ACCESS

A. Parties agree to universal access as a critical One Stop system provision. Specifically, this means that for client access to core services, there shall be no requirement for an initial determination of eligibility. Access to core services will not be limited by any One Stop Operator Consortium policy relative to eligibility determinations.

B. Policies adopted locally for ensuring access for all customers including those with special needs, include those with a) literacy deficits; b) disabilities; c) Limited English Speakers; and d) others with economic or geographical barriers to service or employment. Special efforts to plan and implement universal access may be incorporated herein or in other relevant documents/agreements with the One Stop Operator Consortium

VIII. METHODS OF REFERRAL

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

   1. Receive a written referral form with the date, time, reason for, and place of the appointment.
   2. Receive scheduling for an appointment within three working days from the date of the referral.

B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

C. The Consortium in consultation and coordination with PIC, Inc. agrees to develop and implement processes reasonably acceptable to all One Stop San Francisco partners for common intake and referral, with the commitment to evaluate this process and modify it when necessary.

D. A mutually acceptable referral process and forms shall be adopted by the One Stop Operator Consortium and System Administrator, with the commitment to evaluate this process and modify it when necessary.

E. The Consortium agrees to develop a program for cross-training partner staff on the services of each participating Full Service One Stop Center partner and the spectrum of related services available through the several agencies. As appropriate, site visits and joint training shall be available to staff conducting referrals.

IX. SHARED TECHNOLOGY AND SYSTEM INFRASTRUCTURE

The parties agree to the principles of common reporting and shared information through electronic One Stop systems and mechanisms including shared technology. The Act identifies technology as a critical tool in making possible all aspects of information exchange including reporting, MIS, data collection, referral services, common case management, employer contacts, client as well as service tracking, and seamless service provision overall.

X. CAPACITY BUILDING

Parties to the MOU agree to a high level of professional standards related to the Center staff competencies and protocols, as well as a professional environment for customers of the Center. The steps to be taken locally to define, communicate, and ensure such standards encompass:

1. All aspects of joint planning and capacity-building efforts shall be examined in the context of adaptability to needed change, customer service and continuous improvement.

2. The One Stop Operator Consortium agrees to work continuously to ensure collaboration with state and regional efforts to provide service delivery in response to identified capacity building needs.

XI. CONSORTIUM BUSINESS MANAGER

The Consortium will govern themselves through a Governance Agreement (See Attachment B).

XII. PRIMARY RESPONSIBILITIES OF THE WISF BOARD

The WISF Board, in partnership with the Mayor of San Francisco, is responsible for setting policy for the portion of the statewide workforce investment system within the One Stop San Francisco system. This system includes the Full Service One Stop Center, satellites, and any electronic or physical sites that provide information for services for access to workforce development activities within the San Francisco Workforce Investment Area. The following identifies some of the specific lead responsibilities belonging to the WISF Board:

1. Develop and submit a local plan.
2. Select the One Stop Operator Consortium.
3. Develop a budget for the purpose of carrying out the duties of the local board.
4. Conduct oversight with respect to local programs of youth activities authorized under Section 129, local employment and training activities authorized under Section 134, and the local Workforce delivery system.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One Stop San Francisco system.
11. Collaborate with the One Stop Operator Consortium in developing and maintaining the system's technology links.

XIII. PRIMARY RESPONSIBILITIES OF THE CONSORTIUM

The following identifies some of the specific lead responsibilities belonging to the Consortium in the operation of the Full Service One Stop Center at 3120 Mission Street:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes; including customer satisfaction outcomes for both employers and job-seekers;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board;
9. Providing recommendations for Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer and universal jobseeker outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.
18. Ensuring that reasonable efforts will be made to insure the safety and security of all customers and staff.

XIV. JOINT MARKETING

The parties to the MOU agree to a collaborative marketing strategy informing job seekers, employed individuals, the business community and employers, economic development representatives and the community at large about the services available through One Stop San Francisco. Such collaboration shall be both by and between the Full Service One Stop Center partners and by and between the Consortium and the WISF Board.

XV. ADDITIONAL AND PRIMARY RESPONSIBILITIES OF THE SEPARATE CONSORTIUM MEMBERS

The following identifies some of the specific lead responsibilities belonging to each member of the Consortium.

A. San Francisco Department of Human Services serves as the lead business agent. Primary responsibilities include:

1. Oversight of and reporting on the Full Service One Stop Center budget for 3120 Mission Street.
2. Limited participation in and the implementation of a regimen of coordinated employer outreach and marketing activities
3. Limited participation in initial assessment activities
4. Assistance in job search and placement assistance and career counseling activities where appropriate for welfare clients
5. Provision of labor market information
6. Provision of Center coordinated activities related to information on the performance of the local area and One Stop San Francisco upon availability
7. Participation in the provision of information related on the availability of supportive services in the local area and referral to such services as needed
8. Participation in the provision of coordinated activities related to assistance in establishing eligibility for WtW activities and financial aid assistance
9. On-site childcare
10. Provision of language capacity – interpretation and translation assistance
11. Targeted vocational assessment with the focus on the WtW client
12. Targeted group counseling for WtW clients
13. Targeted individual counseling and career planning for WtW clients
14. Case management for WtW clients
15. Short-term prevocational service activities to include: Job Readiness, STEPS, Jump Start, How to Look for a Job, 30-Ways to Shine, and a future Money Management and Family Balancing workshop

B. Employment Development Department (EDD): Keys areas of responsibility include automated labor exchange, job referrals, job order collection and management, and labor market information. EDD is also a partner in the coordination of a unified employer outreach strategy. General responsibilities include:

1. Verbal assessment of each customer
2. Provision of Job search and placement assistance through CalJOBS, the Experience Unlimited Program, Veterans programs, Intensive Services Program and other referral activities

3. Written labor market information and access to CalMIS, EDD's internet access to labor market data and information
4. Information on the availability of supportive services through a community directory of supportive services, union information, training information, and maintenance of public bulletin boards with related information
5. Access to UI claim filing, assistance to UI claimants in resolving access and information problems, California Training Benefits, and Initial Assistance Workshops
6. Long-term unemployed program provides follow-up and retention services for eligible long-term unemployed clients
7. Coordination of the Employer Advisory Council
8. Development of an individual employment plan for the Intensive Services Program, Job Agent Program, Department of Corrections, and the Long-term unemployed
9. Provision of case management for the Intensive Services Program, Job Agent Program, Veterans Program, Department of Corrections, and the Long-term unemployed

C. Community College of San Francisco has the lead responsibility for assuring the One Stop Career Center is linked to local education and employment activities. Responsibilities include:

1. Participation in coordinated outreach activities to local High Schools and Community Based Organizations and Rapid Response and Dislocated Worker activities. Participation in coordinated orientation workshops
2. Participation in coordinated initial assessment activities
3. Job Search and placement assistance through coordinated customer service activities in the Resource Area, contribution to the Center Resource Library, and career counseling and advising activities
4. Provision of labor market information through Career Development Workshops and shared resume advisors
5. Provision of on-site training and information to Center personnel concerning CCSF educational offerings, occupational programs and financial aid programs
6. Provision of information on the availability of supportive services and referral to such services through the CCSF web-site, general counseling, transfer, OIS, and the Vocational Education program
7. Provision of comprehensive and specialized assessments through Basic Skills Assessment, Career/Vocational Assessment for CalWORKS clients and the general public, and assessment and career services orientation
8. Provision of career counseling and career counseling for group assessment interpretation
9. Provision of short-term, prevocational services through career development workshops (Jump Start Your Career and Choices) and occupational training workshops

10. Provision of occupational skills training, work experience courses in various occupational areas, skill upgrading and retraining, entrepreneurial training, job readiness training, adult education and literacy activities such as Learn-to-Earn, English as a Second Language, and basic skills courses, and customized training/contract education activities.

D. National Council on the Aging maintains the lead responsibility for assuring the One Stop Career Center is linked to local programs providing services to economically disadvantaged mature adults. General responsibilities include:

1. Provision of coordinated outreach and intake activities
2. Participation in the provision of coordinated initial assessment activities
3. Participation in the provision of coordinated placement assistance
4. Participation in the provision of coordinated labor market information activities
5. Coordinated provision of program performance information and program cost information
6. Provision of information on the performance of the local area and One Stop San Francisco upon availability/commencement of information
7. Provision of a database as a tool for participation in coordinated activities related to information on the availability of supportive services in the local area and referral to such services as needed
8. Assisting in the coordinated provision of information on filing UI claims
9. Follow-up services for Title V eligible clients
10. Assisting in the provision of information and referral to other core services
11. Workshop scheduling
12. Comprehensive and specialized assessment upon determination of eligibility for Title V services
13. Development of an individual employment plan upon determination of Title V eligibility
14. Group counseling for those qualified for Title V services
15. Individual counseling and career planning for Title V eligible clients
16. Case management for those qualified for Title V services
17. Short-term, prevocational services including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct
18. Occupational skills training through computer training
19. On-the-job training
20. Provision of programs that combine workplace training with related instruction
21. Training programs operated by the private sector
22. Skill upgrading and retraining
23. Entrepreneurial training on occasion
24. Job-readiness training
25. Adult education and literacy activities

26. Provision of customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training

E. The Private Industry Council of San Francisco, Inc. (PIC, Inc.), as agent of the partnership between the Workforce Investment San Francisco Board (WISF) and the Mayor of the City and County of San Francisco (CLEO) is the sub-grant recipient of Workforce Investment Act formula funds for the City and County of San Francisco and is the System Administrator for One Stop San Francisco. As agent, System Administrator, and sub-grantee, PIC, Inc. serves as the administrative agent for Act funds and represents the joint and several liability of the WISF Board and CLEO for disallowed Act costs. Primary responsibilities include:

1. Maintaining and coordinating the full array of WIA Title I adult and dislocated worker services, including assurance for access to core/universal services, and referral to providers of intensive and training services
2. Participation in coordinated employer outreach and marketing activities
3. Implementing the local Individual Training Account system and for coordinating On-the Job training activities
4. Participate in the coordinated establishment of common One Stop Career Center systems and procedures
5. Participate in the coordinated staff-training and capacity building efforts for all One Stop Career Center partners
6. Assuring coordination between WIA funded and other welfare funded employment related programs and activities
7. Maintenance of the One Stop MIS, data tracking and reporting systems and the common case management system
8. Assuring compliance with WIA mandatory and other Workforce Investment Board established performance measures, including customer satisfaction indices for both employers and job seekers.

XVI. SITE AND STAFF MANAGEMENT AND SUPERVISION

A. The Consortium members agree to establish arrangements for site supervision.

B. The WISF Board and Consortium members certify that its Full Service One Stop Center will recognize and comply with applicable labor agreements affecting represented employees located at the respective sites. This shall include the right of access by State labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.3 [commencing with Section 3512] of Division 4 of Title 1 of the Government Code).

C. Employees who are located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil rights and responsibilities. Employees performing services at the Center shall retain existing civil service and collective bargaining protections on matters relating to employment, including, but not limited to, hiring, promotion, discipline, and grievance procedures.

D. If work-related issues arise at the Center between employees and the Consortium or supervisors of other partners, the Consortium or other supervisor shall refer such issues to the employees' civil service supervisor. The Consortium and Center partners shall cooperate in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning state employees and state employee misconduct.

For further details of how such supervision occurs, refer to the Consortium Governance Agreement.

XVII. MODIFICATION AND ASSIGNMENT

This MOU may be modified by written agreement of the parties. A modification to the MOU shall become effective after all parties have indicated acceptance of the modification through written acknowledgement (signature). Any assignment of responsibilities under this MOU by any of the parties shall be subject to prior approval by the WISF Board.

XVIII. SEVERABILITY

If any part of the MOU is found to be null and void, or is otherwise stricken, the rest of this MOU shall remain in force.

XIX. JURISDICTION

Jurisdiction over any disputes under this MOU shall reside in the City/County of San Francisco, California.

XX. DURATION

A. This MOU shall remain in effect for one-year with an option to renew by both parties, until designation of the One Stop Operator Consortium has been terminated by the WISF Board, otherwise by repeal of the Workforce Investment Act of 1998, otherwise by action of law, or in accordance with this Section. The Consortium is entitled to a minimum 90 days notice of the effective date of the WISF Board's removal of designation.

B. Any party may withdraw from this MOU by giving written notice of intent to withdraw at least 180 calendar days in advance (unless granted authority to dissolve it sooner by separate provision of this MOU).

XXI. CONFIDENTIALITY REQUIREMENTS

The One Stop Operator Consortium, Center partners, and affiliates will exchange various kinds of information pursuant to this agreement and under the provision of the Act. That information may include data, applications, program files, and databases. Such data and information are confidential when they define an individual or an employing unit. Confidential information requires special precautions to protect it from unauthorized use, access, disclosure, modification, and destruction. The Consortium agrees that Consortium members shall keep all information that is exchanged between them and the Center partners in the strictest confidence.

XXII. ATTACHMENTS

Essential attachment(s)s to this Memorandum include:

A. The San Francisco Workforce Investment Area Negotiated Performance Benchmarks.
B. Governance Agreement

SIGNATURES:

Upon signature of this MOU by the Mayor of the City and County of San Francisco, the WISF Board Chair, and all Consortium agency representatives of said One Stop San Francisco who have united to become the One Stop Operator Consortium as defined in the Act, Section 134 shall be of force and effective until such date of termination as described herein.

FOR THE MAYOR OF THE CITY AND COUNTY OF SAN FRANCISCO

Mayor Willie L. Brown, Jr.	Date

FOR THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Lynn Bunim, Chair	Date

FOR THE ONE STOP OPERATOR CONSORTIUM

Name & Title Department of Human Services	Date
Name & Title Employment Development Department	Date
Name & Title Community College of San Francisco	Date
Name & Title National Council on the Aging	Date
Name & Title Private Industry Council, Inc.	Date

CONSORTIUM GOVERNANCE AGREEMENT

This Governance Agreement entered into as of ____________________, 2001 by and among the San Francisco Department of Human Services, Employment Development Department, City College of San Francisco, National Council on the Aging, and Private Industry Council, Inc. hereinafter referred to as "Consortium", "parties" or "partner".

WITNESSETH:

WHEREAS, the above parties have agreed to enter into an agreement for the purposes of establishing a Governance Agreement for the operation of the One Stop Center located at 3120 Mission Street, and

WHEREAS, the parties wish to define the terms of that Agreement,

NOW, THEREFORE, it is agreed by and between the parties as follows:

I. Structure of the Consortium

A. The Director, President, or their designated representative of each respective agency shall be the ultimate representative to the Consortium.

B. The Consortium will establish a Management Committee made up of at a minimum level a manager from each respective agency.

C. The Consortium will establish a Center Operations Committee made up of representatives who have established physical location at the Center and have signed a Participation Agreement.

D. The Consortium shall interview as a panel and employ a Center Manager through consensus of determination.

II. Governance

The ultimate accountability and responsibility for the Full Service One Stop Center (Center) operational and organizational activity and accomplishment will rest with the Consortium. The Consortium will design, implement, and operate the Center as defined in the Workforce Investment San Francisco Board (WISF)/Consortium Memorandum of Understanding and One Stop Operator Consortium Charter.

A. The Directors shall meet no less than quarterly for purposes of Center planning and design, strategies for implementing WIB policy, procedure approval, and oversight of operations. Ultimate Center accountability shall rest with the Consortium Directors.

1. The Directors shall annually establish one of their members to be the principle spokesperson and point of contact with the WISF Board and PIC, Inc. as the WIA funding and administrative entity.
2. The Directors shall determine a methodology for establishing an agenda for all their meetings.
3. The Directors will decide what level of decisions concerning the operation of the Center can be made at which level and determine which items need to be brought to the WISF Board.
4. The Directors will determine how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.

B. The Management Committee shall meet no less than monthly with, at a minimum, all required Center partners for purposes of implementation of WISF Board policy, establishment and implementation of procedures, compliance with the commitments outlined in the WISF Board/Partner Memoranda of Understanding, and daily operational issues.

C. The Center Manager shall meet weekly with the Management Committee. The Center Manager is ultimately accountable to the Consortium for all activities related to the operation of the Center; however direct reporting will be limited to the Management Committee. In the event a decision is needed outside the scope of the Center Manager's responsibility, the Management Committee will either make the decision or determine whether the issue needs to be forwarded to the Consortium for consideration.

D. Each level of participation can make decisions respective to their scope of authority or submit recommendations concerning services and/or operations outside their respective authority. Recommendations shall come forth in a format to include identification of the issue, available options, and recommendation for approval.

III. Disputes

Either party may request a meeting of the parties to discuss and resolve disputes.

The parties shall first attempt to resolve all disputes informally.

A Third Party Mediation Specialist may be called in to help mediate any disputes.

Informal mediation services, however, shall be explored prior to any other formal or legal process.

Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

Should such efforts at mediation fail, the WISF Board reserves the right to dissolve the Governance Agreement with sixty- (60) days notice.

IV. Scope of Agreement

A. The Consortium agrees to communicate and coordinate their respective activities and resources in ways that will be conducive to higher quality, cost-effective, and customer-friendly workforce development services in and through the One Stop San Francisco system.

Communication from the Consortium will strive to inform and solicit input from all participating Center partners.

B. Details of coordination and integration of services among the Center partner organizations will be spelled out in written procedures developed by the Management Committee and approved by the Consortium Directors.

V. Duration of Agreement

The parties agree that the terms of this Agreement will take effect immediately and will continue in effect until such time as any partner or partners shall modify, extend, or terminate this Agreement as provided below.

VI. Modification of Agreement

Agreement may be modified by written agreement of the parties. A modification to the Governance Agreement shall become effective after all parties have indicated acceptance of the modification through written acknowledgement (signature).

VII. Incorporation of Additional Consortium Parties to Agreement

The parties to this Agreement may agree to invite other organizations to participate as a Consortium partner. If such an invitation is issued and accepted, the organization will be considered a party of this Agreement from the date of its acceptance letter. The Consortium may also elect to change the status of any member organization based on the level of its commitment.

VIII. Withdrawal from Agreement

Any party to this Agreement may withdraw by giving written notice by December 31st of the calendar year preceding the start of the fiscal year for which withdrawal is to take effect. Fiscal year is defined as July 1 through June 30. In such case, all pertinent terms of the Agreement will continue in effect for the remaining parties.

IX. Termination of Agreement

This Agreement will continue in effect so long as at least three of the signatory organizations remain partners at the Full Service One Stop Center at 3120 Mission Street in San Francisco with approval of the WISF Board. Termination of the Agreement will be effective in either of two situations: (1) all remaining parties agree in writing to its termination; or (2) one of three remaining partners provides written notification of termination to the remaining two partners.

THE PARTNERS TO THIS AGREEMENT EVIDENCE THEIR ACCEPTANCE OF ITS TERMS BY THEIR SIGNATURES BELOW.

Name & Title S.F. Department of Human Services	Date
Name & Title Employment Development Department	Date
Name & Title City College of San Francisco	Date
Name & Title National Council on the Aging	Date
Name & Title Private Industry Council, Inc.	Date

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD
MAYOR WILLIE L. BROWN, JR.

DATE: JANUARY 9, 2002

FROM: LESLIE LUTTGENS, VICE CHAIR

SUBJECT: RECOMMENDATIONS FOR CARRY FORWARD REFUGEE FORMULA FUNDS WITH REVIEW OF SUBCONTRACTORS' FEDERAL FISCAL YEAR (FFY) 2000 PERFORMANCE AND RECOMMENDATIONS FOR PROGRAMS CURRENTLY ON PROBATION

Background

On December 5, 2001, the Program Resources Committee (PRC) met, reviewed staff's recommendations for carry forward funding and for programs on probation, and solicited public testimony. Unfortunately, a quorum was not reached at that meeting and no formal vote was taken. PRC then forwarded staff's recommendations to the Executive Committee for its approval.

On December 14, 2001, the Executive Committee met, solicited public testimony, and unanimously approved staff's recommendations. The Board and Mayor Willie L. Brown, Jr. are asked to ratify this action.

Recommendations for Programs Currently on Probation

FFY 2001 funding for two programs, REAP's IR program and AIRRC's ES program, was recommended on a probationary basis due to low placement rates.

REAP's IR Program

A review of performance data as of September 30, 2001 shows that REAP's FFY 1999 program achieved a 69% placement rate. Staff also reviewed FFY 1999 data through October 31, 2001, as it was available. There was no change in the data from September to October.

Of the 25 refugees enrolled in the FFY 2000 program, 18 completed their training on or before June 30, 2001, and therefore have been out of training for three months or more. Of those, 3, or 17 % were placed in jobs as of September 30, 2001. A review of data through October 2001 indicates that 4 (22%) of those who have been out of training for three months or more were placed through October. As of this date in November, PIC received documentation for an additional 6 placements, of which 3 of the refugees had

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

been out of training for three months or more. If we consider all available data to date, the program has placed 7 (39%) of the 18 who completed their training on or before June 30, 2001. It has an overall placement rate of 44%.

RECOMMENDATION

Since REAP's IR program got very close to the FFY 1999 stipulation, but fell far short of the FFY 2000 one, it is recommended that the program remain on probation through February 28, 2002, at which time, the program's probationary status will be re-evaluated and it would be expected that 70% of all FFY 2000 enrollees would be placed. As of October 30, 2001, all of the refugees have completed training.

AIRRC'S ES PROGRAM

A review of performance data as of September 30, 2001 shows that AIRRC's FFY 2000 program achieved a 19% placement rate. Staff also reviewed FFY 2000 data through October 31, 2001. AIRRC's placement rate at the end of October was 25%. PIC has not received any additional placements in November. There are four refugees who are still active and not placed. If all four were placed, AIRRC would have a 50% placement rate.

For September and October, JVS's ES program for those younger than 50 years of age achieved 57% and 61%, respectively and REAP's ES program achieved 52% and 53%. JVS's ES program for those 50 and over had a 45% placement rate at the end of both September and October.

RECOMMENDATION

Because it has fallen well short of the probationary requirement, and it is believed that the refugees would be better served in other refugee employment programs, it is recommended that the AIRRC program be de-funded effective December 31, 2001. All active refugees would be transferred to another refugee program at that time.

Carry Forward Funding Recommendations

Table 4 represents Executive Committee recommendations for the carry forward funds. They are:

- Increasing funds for the Central Intake Point for intake and assessment services for the additional refugees to be served.
- Increasing Catholic Charities' ES program enrollment goal by 8. Total planned enrollment goal of 58 is two fewer than the number of enrollments achieved last year (60).
- Increasing Jewish Vocational Service's (JVS) Office Technology and Communication (OTC) enrollment goal by 12. This will enable JVS to offer night classes for refugees who are working, but not yet self-sufficient. Total planned enrollment goal of 27 matches the number of enrollments achieved last year.

- Increasing Jewish Vocational Service's (JVS) Computer-Assisted Drafting & Design (CAD) program enrollment goal by 10. It currently has a waiting list of approximately 8 refugees. Total planned enrollment goal of 24 matches the number of enrollments achieved last year.
- Slightly increasing funds for supportive services, including transportation and childcare subsidies, for the additional refugees to be served.

Staff will be available at your January 16, 2002 meeting to answer any questions you may have. Please feel free to contact Karen Hart at 415-923-4260 should you have questions before the January 16th meeting.

Attachment

cc: Program Resources Committee
Refugee Subcontractors
Jay Nelson, CDSS
DHS Staff
PIC Staff

TABLE 4
EXECUTIVE COMMITTEE RECOMMENDATIONS FOR FFY 2000 REFUGEE CARRY FORWARD FUNDS

Proponent	Activity	Current Funding	Additional Funds Recomm	Additional TA	Additional RESS	Revised Recomm	Rev Recom		Place. Rate
							Svc.	Plc.	
International Rescue Committee	CIP	$85,862	$6,560	$4,510	$2,050	$92,422	NA	NA	NA
Catholic Charities/REAP	ES	$92,500	$14,800		$14,800	$107,300	58	38	66%
Jewish Vocational Service	ES	$197,440				$197,440	80	52	65%
African Imm. & Refugee Res. Center	ES	$27,500				$27,500	11	7	64%
Catholic Charities/REAP	Broker	$18,670				$18,670	10	8	80%
Jewish Vocational Service	Broker	$18,990				$18,990	10	8	80%
Jewish Vocational Service	VT-IT	$62,552	$44,680	$44,680		$107,232	24	19	79%
Jewish Vocational Service	VT-OTC	$66,120	$52,896	$52,896		$119,016	27	22	81%
International Institute of San Francisco	A/SAS	$35,000				$35,000			
Jewish Family & Children's Services	A/SAS	$15,885				$15,885			
Subtotal		$620,519	$118,936	$102,086	$16,850	$739,455	220	154	70%
IR/OJT Set Aside		$75,000				$75,000			
Transportation/Childcare		$20,000	$1,050	$781	$269	$21,050			
Total		$715,519	$119,986	$102,867	$17,119	$835,505			
PIC Administration		$126,267	$423	($4)	$427	$126,690			
Grand Total		$841,786	$120,409	$102,863	$17,546	$962,195			

CIP	Central Intake Point
ES	Employment Services
VT/IT	Vocational Training/Information Technology
VT/OTC	Vocational Training/Office Technology & Communication
A/SAS	Acculturation/Social Adjustment Services

11/27/01

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

Date:	Wednesday, March 20, 2002
Time:	9:30 a.m. – 11:30 a.m.
Location:	Yerba Buena Center for the Arts 701 Mission Street The Forum San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

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Revised: Tuesday, March 12, 2002

Proposed Agenda

1. Adoption of the Agenda (Action Item)
2. Adoption of the Minutes for the meeting on January 14, 2002 (Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations (Discussion Item)
    A. "A Consensus to Build the 21st Century Workforce" – Mary Edington
    B. "San Francisco Information Technology Consortium: Techladder and Beyond" – Amanda Feinstein
    C. "Snapshot of Current San Francisco Employment/Unemployment" – Tom Ryan
5. Committee Reports (Discussion Item)
    A. One Stop Committee
    B. Youth Council
    C. Program Resources Committee
    D. Research and Evaluation Committee
    E. Employer Services Committee
6. Consent Calendar (Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

    A. Proposed Action: Ratification of Memorandum of Understanding for Youth Employment Coordination Project for a Youth Employment Partnership Position
    B. Proposed Action: Ratification of PY'2002 Planning Considerations for Workforce Investment Act Adult Programs
    C. Proposed Action: Ratification of Locally Recognized Credentials for Adult and Dislocated Worker Programs

7. Executive Committee Recommendations (Action Items)**
    A. Proposed Action: Ratification of WIA Title 1D Youth Service Subcontractors
    B. Proposed Action: Ratification of Proposed Youth Vendor Applications

9. President's Report (Discussion Item)
    A. Presentations:
        1. Annual Reporting and Disclosure Responsibilities of WIB Members
        2. WIB Member Survey Results

10. Chair's Report (Discussion Item)
11. Public Testimony on Non-Agenda Items (Discussion Item)
12. Future Agenda Items (Discussion Item)
13. Adjournment (Action Item)

**Information to be sent.*

***These items are on the March 13, 2002 Executive Committee Agenda for consideration. Information on these items will be mailed and posted on the website after the Executive Committee has taken action.*

Yerba Buena
Center for the Arts
Mission @ Third, San Francisco

701 Mission Street San Francisco, CA 94103

In the heart of an exciting downtown neighborhood...
Surrounding Yerba Buena Gardens are Moscone Convention Center, major hotels, art galleries and dozens of excellent restaurants. Yerba Buena Center for the Arts is located on the eastern side of the Garden Esplanade, bordering Third Street. Our Visual Arts Galleries, Forum, and Screening Room sit on the corner of Third and Mission Streets, while our Theater sits on the corner of Third and Howard Streets. Both buildings are just a short walk from the BART/Muni Powell Station. A dozen parking lots and three garages for over 3,000 cars are all within one block.

From the East bay via the Bay Bridge: Take the Fremont Street exit to Howard Street. Turn left on Howard Street and proceed about three blocks to Third Street. You'll see our Theater on the right at Third Street and Howard. Turn right on Third to reach our loading entrance.

From the Peninsula via 101 and Interstate 80 East: Take the Fourth Street exit and proceed onto Bryant Street. Turn left on Third Street. You'll find us along the left side of Third Street between Howard and Mission Streets.

From the Golden Gate Bridge: Follow Lombard Street and turn right onto Van Ness Avenue. Proceed south two miles to City Hall. Turn left on Grove Street and proceed three blocks to Market Street. Cross Market to 8th Street and one block later, turn left on Mission Street. Proceed east on Mission Street to Third Street. You'll find us on the right at Third Street.

From BART, Muni or Cable Cars: Board any public Transportation that stops at or near the Powell Street Station on Market Street. Walk to Third Street or Fourth Street and Market Street, turn right and walk just one block to Mission Street. You will see Yerba Buena Center for the Arts on the corner of Mission and Third Streets. Muni buses passing closest to the Center are #30 Stockton, #14 Mission, #15 Third, #45 Union.

From Transbay Bus Terminal, CalTrain Station and Ferry Terminal: The Transbay Terminal is just three blocks east of the Center on Mission Street. Take the #14 Mission bus west or walk the short distance. From the Caltrain Station, take any Muni bus, #30 Stockton, #45 Union/Greenwich or #15 Third up Third Street, away from the station. Get off at Third and Howard. From the ferry Terminal at the foot of Market Street, board any #7 or #8 bus going west on Market Street, or #14 west on Mission Street. Get off at Third Street.

For more traveling information call Yerba Buena at (415) 978-2700 or Private Industry Council, Inc. at (415) 923-4003.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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Revised: Thursday, March 14, 2002

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Revised Proposed Agenda

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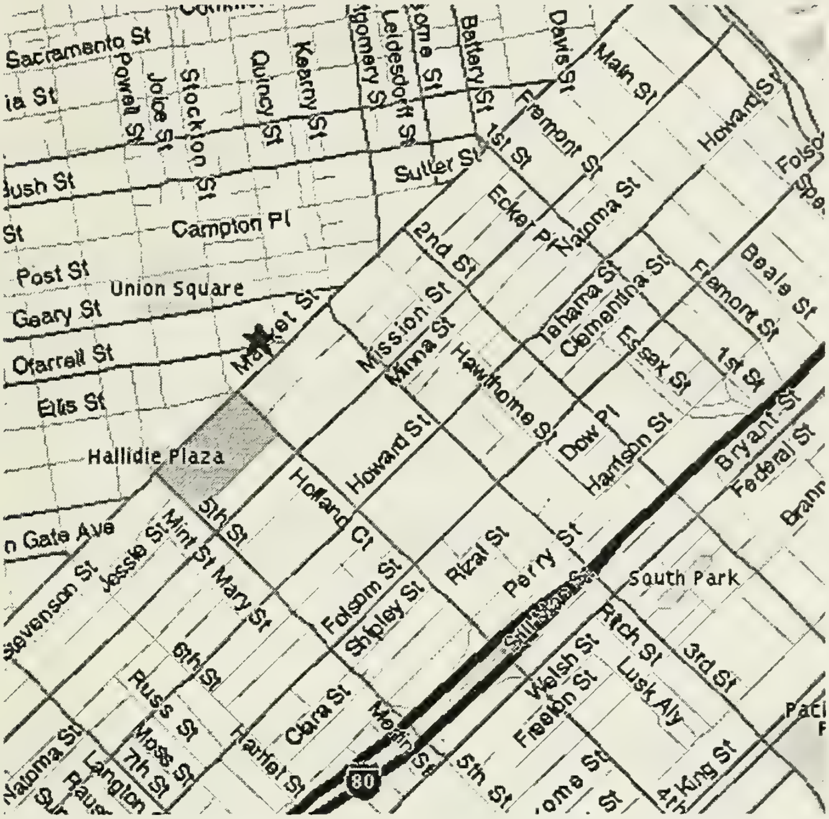
12. Future Agenda Items (Discussion Item)
13. Adjournment (Action Item)

**Information to be email/faxed.*

***Information enclosed.*

Macy's West Human Resources
35 O'Farrell Street, 11th Floor
Training Room A
(415) 954-6662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Sutter St
Campton Pl
Post St
Union Square
Geary St
Ofarrell St
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Ecker Pl
Natoma St
Mission St
Minna St
Tehama St
Clementina St
Beale St
Fremont St
Essex St
1st St
Hawthorne St
Dow Pl
Harrison St
Bryant St
Federal St
Hallidie Plaza
Gate Ave
Jessie St
Mint St
5th St
Holland Ct
Howard St
Mary St
Stevenson St
Rizal St
Perry St
South Park
Folsom St
Shipley St
6th St
Russ St
Moss St
7th St
Harriet St
Clara St
Welsh St
Freelon St
Ritch St
Lusk Aly
3rd St
King St
Natoma St
Langton
80

Macy's West Human Resources on 35 O'Farrell Street is located between Stockton and Market Streets. It is on the same side of O'Farrell as FAO Schwartz and is across from the Macy's Men.

Parking

Ellis O'Farrell Garage (415) 986-4800 Located 123 O'Farrell Street

Hourly Rate
First hour: $2.00
Two hours: $ 3.00
Three hours: $4.00
Four hours: $6.00

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD **DATE:** MARCH 14, 2002

FROM: LYNN BUNIM, CHAIR
EXECUTIVE COMMITTEE fr LB

SUBJECT: PY'2002 PLANNING CONSIDERATIONS, WORKFORCE INVESTMENT ACT, ADULT PROGRAMS (AGENDA ITEM 6A)

The Workforce Investment Board is asked to approve a development plan for Workforce Investment Act (WIA) Adult formula funds for the Program Year beginning July 1, 2002 (PY'02).

BACKGROUND

Last year, local allocation amounts for WIA formula grants – Adult, Youth, and Dislocated Worker – were not announced by the State until May 17, just six weeks before the beginning of the program year. The resulting rush of decision-making by the One Stop Committee, Program Resources Committee, and Executive Committee was extraordinarily hectic. Many questions that should have been addressed were not.

In order to have a more rational transition this year, the Program Resources Committee recommends making early agreements about the process and making as many early decisions as possible without knowing grant allocation figures.

PLANNING OPTIONS

There are a range of options that are possible for PY'02, including –

1. Continue using only existing WIA service delivery contractors. Current WIA Adult contractors were solicited for up to three consecutive years beginning July 2000. All were evaluated for their first year's performance, and are currently in the middle of their second year. Those performing acceptably in the current year could be extended for a third year, through June 30, 2003. If any current programs are not continued, those dollars could be applied to enhancing acceptably performing contracts or to new programs selected from among the proposals submitted in the original solicitation.

   Pro: Extending contractors for a third year takes advantage of their extensive WIA program expertise and experience in working with WIA and PIC requirements.
   Con: Given the recent downturn in the economy and the relatively few training choices represented by these contracts, the needs of area employers and people with barriers to employment may not be as well addressed as possible with the current configuration of contracts.

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2. Issue a new solicitation. The opposite approach is to go back to the drawing board with a new Request For Proposals (RFP) or Request For Qualifications (RFQ).

   Pro: The economy has changed, and new labor market data are available.
   Con: Solicitations are very time-consuming for all concerned. Community-based organizations already face multiple RFP releases, and if current contractors compete successfully they've simply jumped through another hoop.

3. Continue the most effective contractors ***and*** create a fund for new initiatives. This middle choice offers some benefits of each of the earlier options. A new fund could be used, for example, as a One Stop "IR Pool" for individual referrals to the Eligible Training Providers List, or to develop customized training.

   Pro: It retains contractors who are performing, yet allows for trying something new.
   Con: It reduces funds in direct support of community-based agencies.

The Committee adopted and now recommends the third option, the creation of a pool for new initiatives along with a third year extension for the most effective contracts. An entirely new solicitation for the final two years of WIA is required one year from now, but until then there can be experiments in new ways to deliver services.

EVALUATING CONTRACTORS

The Committee adopted and now recommends that 21 months of WIA performance data be used in developing contractor recommendations, and that contractors be notified that March 30, 2002 will be the cutoff date for performance data review.

COMMITTEE ROLES IN PLANNING FOR PY'02

The *One Stop Committee* is responsible for recommending distributions of WIA funds at the system level. A year ago, its actions divided each WIA allocation into three broad areas of expense, as follows:

- 65% of each grant allocation to be expended for participant training, primarily through competitively procured PIC-CBO subcontracts targeting persons with multiple barriers,
- 25% to be expended for system building, including – by financial agreement with a Consortium of One Stop partners – 10% for achieving WIA compliance at the full service One Stop center, and
- 10% to be expended for PIC's administration.

The *Program Resources Committee* is responsible for recommending specific expenditures of participant training dollars. These obligations have been primarily for competitively solicited subcontracts, including related support services such as childcare and transportation.

The *Research and Evaluation Committee* will help develop criteria for evaluating subcontractor performance. Its February 7 agenda included a discussion of contract compliance criteria for use in evaluating both WIA and Welfare to Work subcontractors. Its recommendations will determine what data the staff will use in forming its PY'02 subcontractor recommendations to the Program Resources Committee.

CALENDAR EXPECTATIONS

The Committee expects that –

- the State will again be late in announcing grant allocations, as late as mid-May,
- grant amounts will be less than current allocations (by an unpredictable amount),
- the One Stop Committee will provide timely system-level decisions,
- the Research and Evaluation Committee will provide contract evaluation guidance,
- PIC's data systems will report on 21-month cumulative contractor activity by late April, and
- the Program Resources Committee will need a special meeting in May to consider staff's analysis of contractor performance along with proposed contractor amounts for PY'02, providing that allocations are known.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT BOARD

DATE: MARCH 14, 2002

FROM: LYNN BUNIM, CHAIR
EXECUTIVE COMMITTEE fr LB

SUBJECT: RECOMMENDATIONS FOR WIA TITLE ID YOUTH SERVICE SUBCONTRACTORS AND VENDORS (AGENDA ITEM 7A and 7B)

BACKGROUND

On January 16, 2002 the Workforce Investment San Francisco Board of Directors ratified the November 15, 2001 Youth Council action to adopt the youth services solicitation design elements, program elements, selection criteria and calendar of events for WIA Title IB and ID funds and any other funds WISF Board allocates to youth activities. On December 14, 2001, the PIC issued a combined Request for Proposals (RFP) / Request for Qualifications (RFQ). The solicitation covers a period up to three years beginning with the execution of the first agreement resulting from the solicitation.

SOLICITATION METHODOLOGY

Request for Proposals	Required a detailed program description and budget to serve an identified number of youth. A selected proposal will result in a cost reimbursement contract.
Request for Qualifications	Required a service description and unit price to serve PIC referred youth on an individual basis. Qualifying applications will result in placement on a vendor list.

SCHEDULE

WISF Executive Comm. approved design and selection criteria	December 14, 2001
Announcement of RFP/RFQ and schedule	December 14, 2001
Technical assistance workshop	December 21, 2001
Due date for RFP/RFQ responses	January 10, 2002
Review and scoring of proposals	January 10-24, 2002
Youth Council public hearing	January 31, 2002
WISF Executive Committee approval of subcontractors	February 13, 2002*
WISF Executive Committee approval of subcontractors	March 13, 2002
Projected beginning date of programs	March 1, 2002

***Meeting cancelled due to lost of quorum.**

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SOLICITATION RESPONSE

Request for Proposal (RFP)	33 proponents 58 proposals Total requested $15,022,305
Requests for Qualifications (RFQ)	22 proponents 55 statements of qualification

Refer to Table I for a list of all applications received.

REVIEW PROCESS FOR PROPOSALS

Each proposal was independently reviewed by three to five reviewers who scored the applications according to the selection criteria and weights adopted by the Youth Council. The review team met to aggregate proposal scores, averages were calculated for each criteria and a sum of the averages was determined. Next, proposals were sorted by program, service or activity. Those applications that described a comprehensive, stand-alone program meeting all of the WIA Title IB requirements were grouped and appear in Table II. Since WIA Title IB (formula) funds are typically announced in March or April for the fiscal year beginning July 1, a recommendation for their funding cannot be made at this time. Staff then analyzed applications that proposed individual services or combinations of services to assess the quantity of the services proffered. Finally, PIC Youth Opportunity staff provided information on the need for the range of youth development services at individual Youth Opportunity Grant sites.

Recommendations for WIA Title ID (YOG) funding appear in Table III. The highest scoring proposals were selected for funding in the geographical area in which the services are needed and at the quantity at which staff estimate the demand for that service. Each proposal was considered for the broadest range of possible funding and several were considered for both WIA Title IB and Title ID funding.

Every effort was made to maximize the return on the dollar amount recommended based on **quality** of program, **need** for, and **location** of the services and the **cost** per youth served. This complex selection process did not always result in the recommendation of the highest scoring proposal.

REVIEW PROCESS FOR STATEMENTS OF QUALIFICATIONS

Each statement of qualifications was also reviewed but not scored. Proponents of services for individual referral were reviewed for eligibility to receive federal funds and identification of a unit price. Table IV displays proponents recommended for placement on the vendor list. This list, along with the State of California Eligible Training Provider List (ETPL) and forthcoming State of California Youth Service Provider List may be used to secure services on an as need individual referral basis.

STRATEGIC CONSIDERATIONS

The creation of a youth services vendors list allows staff to secure services based on the needs of individual youth. Since the Youth Opportunity Grant sites are responsible for outreach, assessment, the development of an individual service strategy based on that assessment and comprehensive case management to ensure access to an array of youth development activities, a broad based vendor resource maximizes flexibility without committing resources to service needs that are difficult to predict and may not materialize. The combination of vendor options and programs secured through cost reimbursement subcontracts secures a necessary mix of youth services that maximize resources and programming flexibility.

RECOMMENDATION

The Executive Committee recommends that $3,016,168 of FY01-02 WIA Title ID (YOG) funds be committed to the specific subcontractors as indicated in Table III with individual contract terms to be negotiated by PIC staff based on need. An estimated $980,000 in FY01-02 funds are recommended to be set aside for individual referrals to qualifying vendors. This recommendation is contingent on the continuing availability of YOG funds in an amount necessary to meet current and future needs and obligations.

In the opinion of the reviewers, the proposals recommended for funding and the amount estimated available for individual referral are responsive to the needs of eligible youth and present a sound strategy for meeting YOG program goals.

The Executive Committee further recommends adoption of the vendors designated for approval in Table IV for Youth Program individual referral.

WORKFORCE INVESTMENT ACT - YOUTH PROGRAMS
RFP/RFQ List - Sorted by Proposal

#	Proponent	Prop	#	Proponent	Prop	#	Proponent	Prop
#01.	Enterprise for High School	RFQ	#39.	Young Community Developers	RFP	#77.	Youth Treatment & Ed. Court	RFP
#02.	The Family School	RFP	#40.	Career Resources Dev. Ctr.	RFP	#78.	Youth Treatment & Ed. Court	RFP
#03.	The Family School	RFQ	#41.	Deribas Group, Inc.	RFP	#79.	Mayor's Yth Ed. & Emp. Prog.	RFP
#04.	The Family School	RFP	#42.	Deribas Group, Inc.	RFQ	#80.	Mayor's Yth Ed. & Emp. Prog.	RFQ
#05.	The Family School	RFQ	#43.	International Institute of S.F.	RFP	#81.	New Ways Workers	RFQ
#06.	The Family School	RFP	#44.	Brava Theater	RFQ	#82.	New Ways Workers	RFP
#07.	The Family School	RFQ	#45.	Brava Theater	RFP	#83.	Larkin Street Youth Services	RFP
#08.	Horizons Unlimited of S.F.	RFP	#46.	University of Calif. DANR	RFQ	#84.	S.F. Housing Authority	RFQ
#09.	Mission Lang. & Voc. School	RFP	#47.	University of Calif. DANR	RFQ	#85.	S.F. Housing Authority	RFQ
#10.	Visitacion Valley Comm. Ctr.	RFQ	#48.	University of Calif. DANR	RFQ	#86.	Bayview Hunters Point Fdn.	RFP
#11.	Step School-to-Career	RFP	#49.	University of Calif. DANR	RFQ	#87.	California Lawyers for the Arts	RFQ
#12.	Step School-to-Career	RFP	#50.	YMCA-Bayview Hunters Point	RFP	#88.	Golden Gate Community, Inc.	RFQ
#13.	Recovery Survival Network	RFP	#51.	Young Community Developers	RFP	#89.	Golden Gate Community, Inc.	RFP
#14.	Recovery Survival Network	RFQ	#52.	Young Community Developers	RFP	#90.	Young Community Developers	RFQ
#15.	Recovery Survival Network	RFQ	#53.	Young Community Developers	RFQ	#91.	Young Community Developers	RFQ
#16.	Recovery Survival Network	RFP	#54.	Young Community Developers	RFP	#92.	Young Community Developers	RFQ
#17.	Recovery Survival Network	RFP	#55.	Juma Ventures	RFP	#93.	Holliday Foundation	RFP
#18.	Recovery Survival Network	RFP	#56.	Juma Ventures	RFQ	#94.	Youth Guidance Ctr. Improve. Comm.	RFQ
#19.	Recovery Survival Network	RFP	#57.	Juma Ventures	RFQ	#95.	Jewish Vocational Service	RFQ
#20.	Recovery Survival Network	RFP	#58.	Queer Youth Training Collaborative	RFP	#96.	Jewish Vocational Service	RFQ
#21.	Recovery Survival Network	RFP	#59.	Arriba Juntos	RFQ	#97.	Jewish Vocational Service	RFQ
#22.	Recovery Survival Network	RFP	#60.	Arriba Juntos	RFP	#98.	Jewish Vocational Service	RFP
#23.	Recovery Survival Network	RFP	#61.	Arriba Juntos	RFQ	#99.	Jewish Vocational Service	RFP
#24.	Recovery Survival Network	RFQ	#62.	Arriba Juntos	RFQ	#100.	Youth Chance High School	RFP
#25.	Recovery Survival Network	RFQ	#63.	Arriba Juntos	RFQ	#101.	New Direction	RFQ
#26.	Recovery Survival Network	RFQ	#64.	Arriba Juntos	RFP	#102.	Morrisania West, Inc.	RFP
#27.	Recovery Survival Network	RFQ	#65.	Arriba Juntos	RFQ	#103.	Morrisania West, Inc.	RFP
#28.	Recovery Survival Network	RFQ	#66.	Arriba Juntos	RFP	#104.	Morrisania West, Inc.	RFP
#29.	Recovery Survival Network	RFQ	#67.	Arriba Juntos	RFQ	#105.	Mission Neighborhood Centers	RFP
#30.	Recovery Survival Network	RFQ	#68.	Arriba Juntos	RFP	#106.	Ingleside Neighborhood Center	RFP
#31.	Huckleberry Youth Program	RFQ	#69.	Occupational Therapy Trng. Prog.	RFP	#107.	Asian Neighborhood Design	RFP
#32.	Northern Calif. Service League	RFQ	#70.	Occupational Therapy Trng. Prog.	RFQ	#108.	Asian Neighborhood Design	RFP
#33.	Northern Calif. Service League	RFP	#71.	Gamma Chi Lambda Comm. Dev. Corp.	RFQ	#109.	Trauma Foundation	RFP
#34.	Young Community Developers	RFQ	#72.	Gamma Chi Lambda Comm. Dev. Corp.	RFQ	#110.	S.F. League of Urban Gardeners	RFQ
#35.	Young Community Developers	RFQ	#73.	Young Community Developers	RFP	#111.	OK Alliance Inc.	RFP
#36.	Young Community Developers	RFP	#74.	Young Community Developers	RFP	#112.	OK Alliance Inc.	RFP
#37.	Young Community Developers	RFQ	#75.	Young Community Developers	RFQ	#113.	Young Scholars	RFP
#38.	Young Community Developers	RFQ	#76.	Young Community Developers	RFQ			

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Table II

WORKFORCE INVESTMENT ACT
YOUTH PROGRAMS
TITLE 1B

#	Proponent	Proposed Activity	Requested Amount	Prop. Svc. Level	Points	Consider for Funding
2	The Family School	1B - Comprehensive	$368,276.00	60	87	YES
8	Horizons Unlimited of S.F.	YOG/1B - JRT/Basic Skills/JP	$390,343.00	150	89	YES
9	Mission Lang. & Voc. School	YOG/1B - Basic Skills/VESL/Computer Accounting, Network	$281,974.00	120	88	YES
11	Step School-to-Career	1B - Comprehensive	$500,000.00	223	91	YES
17	Recovery Survival Network	1B - Comprehensive	$357,949.00	95	80	YES
33	Northern Calif. Service League	YOG/1B - Life Skills/Offenders/Comprehensive	$62,000.00	20	84	YES
36	Young Community Developers	1B - Comprehensive	$70,432.00	15	93	YES
40	Career Resources Dev. Ctr.	1B - Comprehensive	$91,337.00	75	82	YES
41	Deribas Group, Inc.	1B - Auto Repair (RFQ?)	$500,000.00	60	4	NO
52	Young Community Developers	YOG/1B - Comprehensive	$899,200.00	160	91	YES
54	Young Community Developers	YOG/1B - Comprehensive	$317,934.00	50	90	YES
58	Queer Youth Training Collaborative	1B - Comprehensive	$206,700.00	150	90	YES
60	Arriba Juntos	JRT/OJT	$86,886.00	20	95	YES
68	Arriba Juntos	1B - Comprehensive	$56,705.00	12	85	YES
69	Occupational Therapy Trng. Prog.	YOG/1B - Comprehensive/JRT	$300,000.00	60	85	YES
78	Youth Treatment & Ed. Court	1B - Comprehensive/AOD Treatment/SAC	$349,993.00	60	92	YES
83	Larkin Street Youth Services	1B - Comprehensive	$216,851.00	250	94	YES
86	Bayview Hunters Point Fdn.	YOG/1B - Comprehensive	$428,546.00	100	84	YES
89	Golden Gate Community, Inc.	YOG/1B - Comprehensive	$517,123.00	100	90	YES
93	Holliday Foundation	YOG/1B - Comprehensive	$497,866.00	80	65	YES
99	Jewish Vocational Service	1B - Comprehensive/JRT	$206,785.00	50	96	YES
100	Youth Chance High School	YOG/1B - GED/Comprehensive	$148,647.00	110	89	YES
102	Morrisania West, Inc.	1B - Comprehensive	$221,940.00	40	60	YES
103	Morrisania West, Inc.	1B - Comprehensive	$321,000.00	120	63	YES
104	Morrisania West, Inc.	1B - Comprehensive	$400,000.00	40	66	YES
106	Ingleside Neighborhood Center	1B - Comprehensive	$90,360.00	100	86	YES
108	Asian Neighborhood Design	1B - Comprehensive/OST	$429,948.00	40	91	YES
111	OK Alliance Inc.	YOG/1B - OST - Cosmetology	$6,350.00	25	38	YES
112	OK Alliance Inc.	Vocational Training - Cosmetology	$5,850.00	25	38	YES
113	Young Scholars	YOG/1B - Comprehensive/Leadership/SAT College Prep	$443,773.00	215	77	YES

01/24/02

WORKFORCE INVESTMENT ACT
YOUTH PROGRAMS
TITLE 1D (YOUTH OPPORTUNITY GRANT)

#	Proponent	Proposed Activity	Requested Amount	Prop. Svc. Level	Points	Recommended Amount	% of Req.	Svc. Level
4	The Family School	YOG - JRT/JP	$368,276	60	87	$0	0%	
6	The Family School	YOG - Basic Skills, GED, Life, Parenting, Leadership	$238,600	60	89	$238,600	100%	60
8	Horizons Unlimited of S.F.	YOG/1B - JRT/Basic Skills/JP	$390,343	150	89	$200,000	51%	75
9	Mission Lang. & Voc. School	YOG/1B - Basic Skills/VESL/Computer Accounting, Network	$281,974	120	88	$200,000	71%	60
12	Step School-to-Career	YOG - Basic Skills, Work Experience, Mentoring, Tutoring	$500,000	223	90	$268,000	54%	120
13	Recovery Survival Network	YOG - JRT/Life Skills/JP	$225,326	180	79	$0	0%	
16	Recovery Survival Network	YOG - Basic Computer/JP	$197,717	42	77	$0	0%	
18	Recovery Survival Network	YOG - JRT/Computer Training/JP	$338,687	95	84	$0	0%	
19	Recovery Survival Network	YOG - Computer Training/JP	$102,709	25	79	$0	0%	
20	Recovery Survival Network	YOG - JRT/Career Counseling/Placement	$28,443	20	79	$0	0%	
21	Recovery Survival Network	YOG - JRT	$22,554	20	75	$0	0%	
22	Recovery Survival Network	YOG - Substance Abuse Counseling	$48,465	20	77	$0	0%	
23	Recovery Survival Network	YOG - Bookkeeping/Accounting/Placement	$24,371	10	80	$0	0%	
33	Northern Calif. Service League	YOG/1B - Life Skills/Offenders/Comprehensive	$62,000	20	84	$0	0%	
39	Young Community Developers	YOG - Leadership	$293,955	50	92	$220,000	75%	37
43	International Institute of S.F.	YOG - Community Service/Leadership	$61,000	50	88	$35,000	57%	25
45	Brava Theater	YOG - Vocational Training - Theatre Tech	$105,000	24	89	$0	0%	
50	YMCA-Bayview Hunters Point	YOG - Basic Skills/GED Prep	$20,000	20	62	$0	0%	
51	Young Community Developers	YOG - Leadership	$70,432	15	91	$0	0%	
52	Young Community Developers	YOG/1B - Comprehensive	$899,200	160	91	$258,000	29%	40
54	Young Community Developers	YOG/1B - Comprehensive	$317,934	50	90	$0	0%	
55	Juma Ventures	YOG - Paid Work Experience	$80,000	20	91	$0	0%	
60	Arriba Juntos	YOG - JRT / OJT	$86,886	20	95	$86,886	100%	20
64	Arriba Juntos	YOG - Basic Skills/JRT/ESL	$122,368	30	80	$0	0%	
66	Arriba Juntos	YOG - Tree Care Classroom/Work Experience	$112,777	24	90	$0	0%	
69	Occupational Therapy Trng. Prog.	YOG/1B - Comprehensive/JRT	$300,000	60	85	$0	0%	
73	Young Community Developers	YOG - AV/Multi-media/Internet/Customer Svc/OST	$144,128	25	87	$0	0%	
74	Young Community Developers	YOG - AV/Multi-media/Internet/Customer Svc/OST	$126,839	25	90	$0	0%	
77	Youth Treatment & Ed. Court	YOG - AOD Treatment/Substance Abuse Counseling	$203,000	35	88	$150,000	74%	26
79	Mayor's Yth Ed. & Emp. Prog.	YOG - Paid Work Experience/JRT	$780,097	200	86	$546,067	70%	140
82	New Ways Workers	YOG - Paid Work Experience/JRT	$314,138	75	88	$314,138	100%	75
86	Bayview Hunters Point Fdn.	YOG/1B - Comprehensive	$428,546	100	84	$0	0%	
89	Golden Gate Community, Inc.	YOG/1B - Comprehensive	$517,123	100	90	$0	0%	
93	Holliday Foundation	YOG/1B - Comprehensive	$497,866	80	65	$0	0%	
98	Jewish Vocational Service	YOG - JRT/Specialized Services (Youth w/disability)	$149,477	30	91	$149,477	100%	30
100	Youth Chance High School	YOG/1B - GED/Comprehensive	$148,647	110	89	$50,000	34%	35
105	Mission Neighborhood Centers	YOG - GED/Leadership	$698,412	100	83	$250,000	36%	36
107	Asian Neighborhood Design	YOG - Occupatinal Skills Training	$429,948	40	91	$0	0%	
109	Trauma Foundation	YOG - Leadership	$523,360	72	58	$0	0%	
111	OK Alliance Inc.	YOG/1B - OST - Cosmetology (RFQ?)	$6,350	25	38	$0	0%	
112	OK Alliance Inc.	? RFQ - Cosmetology	$5,850	25	38	$0	0%	
113	Young Scholars	YOG/1B - Comprehensive/Leadership/SAT College Prep	$443,773	215	77	$50,000	11%	20
						$3,016,168		

Table IV

WORKFORCE INVESTMENT ACT
YOUTH PROGRAMS-INDIVIDUAL REFERRAL-VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved Yes	No
1	Enterprise for High School	JRT	$50.00	X	
3	The Family School	JRT	$6,000.00	X	
5	The Family School	JRT	$6,000.00	X	
7	The Family School	Basic Skills/Life/Parenting/Leadership	$4,000.00	X	
10	Visitacion Valley Comm. Ctr.	Tutoring/Summer Employment/Leadership	$90.00	X	
14	Recovery Survival Network	Life Skills/JP	$1,600.00	X	
15	Recovery Survival Network	Computer Training	$4,700.00	X	
24	Recovery Survival Network	Comprehensive Services	$6,800.00	X	
25	Recovery Survival Network	Computer Training/Life Skills	$6,300.00	X	
26	Recovery Survival Network	Computer Training	$4,700.00	X	
27	Recovery Survival Network	JRT	$1,600.00	X	
28	Recovery Survival Network	Computerized Accounting/Bookkeeping	$2,900.00	X	
29	Recovery Survival Network	JRT	$1,600.00	X	
30	Recovery Survival Network	JRT/Substance Abuse Prevention	$2,900.00	X	
31	Huckleberry Youth Program	Delinquent Prevention/Mentoring	$4,000.00	X	
32	Northern Calif. Service League	Life Skills	$3,100.00	X	
34	Young Community Developers	Leadership/Internship/GED	$4,920.00	X	
35	Young Community Developers	JRT/GED/Chocolate City II	$5,900.00	X	
37	Young Community Developers	Chocolate City II	$7,100.00	X	
38	Young Community Developers	Chocolate City II	$6,100.00	X	
42	Deribas Group, Inc.	Auto Mechanic	$8,000.00	X	
44	Brava Theater	Technical Training for Theatre	$4,375.00	X	
46	University of Calif. DANR	Life Skills Training	$1,269.30	X	
47	University of Calif. DANR	Life Skills Training	$1,269.30	X	
48	University of Calif. DANR	Life Skills Training	$1,178.33	X	
49	University of Calif. DANR	Life Skills Training	$1,178.33	X	
53	Young Community Developers	Leadership/Internship	$4,920.00	X	
56	Juma Ventures	JP/Retention	$4,000.00	X	
57	Juma Ventures	JP/Retention	$4,000.00	X	
59	Arriba Juntos	Computer Training/Business	$5,000.00	X	
61	Arriba Juntos	YOG - OJT/Basic Skills/JRT	$4,344.00	X	
62	Arriba Juntos	Nursing Profession	$4,000.00	X	
63	Arriba Juntos	JRT/ESL	$4,079.00	X	
65	Arriba Juntos	Tree Care Program	$4,725.00	X	
67	Arriba Juntos	Tree Care Program	$4,699.00	X	
70	Occupational Therapy Trng. Prog.	Occupational Assessment/JRT	$90.00	X	
71	Gamma Chi Lambda Comm. Dev. Corp.	Career Exploration	$5,000.00	X	
72	Gamma Chi Lambda Comm. Dev. Corp.	Career Exploration	$5,000.00	X	
75	Young Community Developers	Multi-Media	$5,500.00	X	
76	Young Community Developers	Multi-Media	$6,200.00	X	
80	Mayor's Yth Ed. & Emp. Prog.	Comprehensive/JRT/Academics	$3,900.48	X	
81	New Ways Workers	School To Career/JRT	$4,188.51	X	
84	S.F. Housing Authority	Computer Training	$3,200.00	X	
85	S.F. Housing Authority	Computer Training	$3,200.00	X	
87	California Lawyers for the Arts	Leadership/Violence Prevention/Employment	$2,000.00	X	
88	Golden Gate Community, Inc.	Comprehensive/Employment in their companies	$12,100.00	X	
90	Young Community Developers	JRT/Prevention/Employment	Not Provided		X
91	Young Community Developers	JRT/Environmental	Not Provided		X
92	Young Community Developers	Building Trades Prep.	Not Provided		X
94	Youth Guidance Ctr. Improve. Comm.	Computer/GED/Culinary	$4,000.00	X	
95	Jewish Vocational Service	Computer Skills/Disabled	$3,000.00	X	
96	Jewish Vocational Service	JRT/Work Experience/Disabled	$3,000.00	X	
97	Jewish Vocational Service	JRT/Work Experience/Disabled	$3,000.00	X	
101	New Direction	5 Units of Service- (JRT/BSE/Rec/Leadership/Guidance Cnslg)	$3,056.76	X	
110	S.F. League of Urban Gardeners	Collaborative of 12 agencies providing Comprehensive Svc's	$6,296.62	X	

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES FOR THE MARCH 20, 2002 MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

MEMBERS PRESENT:
Lynn Bunim, Chair; William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.

MEMBERS ABSENT:
Arlene Ackerman, Irene Agnos, Shelley Bradford-Bell, Kathye Citron, Kimberly Cousin, Dr. Philip R. Day, Gregg Fortner, Andrea Jones, Craig Martin, Nate Mason, Kes Nartbutas, Carol Piasente, John Poremba, Marion Standish, and Stan Warren.

STAFF IN ATTENDANCE:
Brenda Brown, Ana Chamorro, Alice Chiu, Cathy DeCristofaro, Mary Fernandez, Karen Hart, Raymond Holland, Greg Marutani, Zenaida Paguirigan, Robert Schwab, Joel Streicker, Judith Villamor.

GUESTS (AS EVIDENCE BY THE SIGN-IN SHEET):
Danilo Brajkovich, Laura Congdon, Devra Edelman, Donna Feingold, Amanda Feinstein, Gary Grady, Don Hesse, Phyllis Jackson, Joel Oppenheimer, Mark Mak, Rhody McCoy, Ernesto Rivas, Nancy Rynd, Lily Sinayuk, Gerry Souzis, Kevin Stange, Roger Tom, Elizabeth Toups.

The meeting was convened at 9:35 A.M. A quorum was not established.

Chair Bunim stated that, in absence of a quorum, she would like to proceed to non-action items. Ms. Bunim thanked the nineteen members who have sent in their completed WIB evaluation surveys. She noted that since there are forty-nine members on the Board, there are quite a few that have not returned their questionnaires. Ms. Bunim asked that staff resend out the questionnaires to WIB members. She pointed out three key findings from the survey.

- Quorum issue. She thanked the nineteen members who were there on time. She stated that it is not fair to those who show up to the meetings on time and are ready to work. She stated that some members expressed that they would like to replace those members who are not able to attend these meetings most of the time. Ms. Bunim stated that she would like to continue to operate and convened the meetings on time. She thanked the Executive Committee because they have started their meetings at 9:35 with a quorum. She thanked John Killacky and his staff for his wonderful facility. Most people from the surveys commented on the accessible location.

- Board Retreat. Some Members suggested having a Board retreat to unify and clarify the focus of the Board. Ms. Bunim plans to form a workgroup from the Executive Committee to begin to collect thoughts and ideas for a retreat to develop a strategic plan for the Board.

- Advocacy. In the survey, Members reminded the Board to continue to practice advocacy, to educate the Electeds. Ms. Bunim directed the Members to the memorandum, titled "Educating the Electeds: Letters of Appreciation to Senators Boxer and Feinstein." She informed the

Members that she and Ms. Calloway have been communicating the importance of workforce development issues with the staff of Senator Barbara Boxer. Ms. Bunim explained that they have been successful at securing the signatures of Senator Boxer and Feinstein to a "Dear Colleague" letter addressed to Senate Budget Committee in support for increasing funding for workforce-training programs in the Fiscal Year 2003 budget. Chair Bunim urged each Member to send letters of appreciation to the appropriate staff of Senator Boxer and Feinstein.

Chair Bunim briefly shared that on a local level, thanks to Mr. Hauge and Ms. Bulach, she has had the opportunity to speak with Jake McGoldrick. Ms. Bunim also thanked Ms. Feeley for scheduling a meeting with one of Nancy Pelosi's staff, Catherine Dodd. She shared that they had productive discussion about legislation in Washington. Ms. Dodd provided advice and counsel on what to do here and how to involve WIBs in the country to voice their concerns.

A quorum was established at 10:11 AM.

Motion to adopt the Agenda was moved by Leslie Luttgens and seconded by Ave Seltsam.
Ayes: William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.
Nays: None.
Abstentions: None.

Motion passed.

Chair Bunim noted that there would not be minutes for adoption.

Presentations

"A Consensus to Build the 21st Century Workforce" by Mary Edington

Ms. Edington stated that she was fortunate to be able to work with Bank of America on this project. Ms. Edington stated, "The idea behind the 21st Century Initiative was to gather thoughts from all local boards and bring forth the ideas to a higher level...to make an impact in our legislation and things that affect how we deliver our services locally." The complete presentation can be obtained on the PIC's website: www.picsf.org.

Chair Bunim pointed out that another point made in the survey results was that the Board would like to see more business involved, specially recruit more small and medium size business involvement.

Chair Bunim gave a warm pre-welcome to Phyllis Jackson, Vice President of Diversity for Charles Schwab. Ms. Bunim expressed that she would hopefully see her at the table next time. She also announced that Linda Lewis had retired from Charles Schwab.

She noted and congratulated Trent Rhorer for his newborn son, Jordan.

She announced that Amanda Feinstein, on April 2nd, would be leaving DHS and joining the Haas Foundation.

"San Francisco Information Technology Training Consortium: TechLadder and Beyond" by Amanda Feinstein

She stated that the Consortium is a soon-to-be project of the Board. This initiative was conceived a year and a half ago by Will Lightbourne, Pamela Calloway, and other community organizations that were training people, particularly welfare to work participants, in IT skills. The focus of the group is to figure out how to involve more welfare participants trained in IT and how to "get ahead" of the IT worker needs. The Consortium convened with six community-based organizations [Glide, Jewish Vocational Services (JVS), Bay Area Video Coalition (BAVC), Goodwill Industries, OpNet, and Arriba Juntos]; City College of San Francisco and Mission College; the San Francisco Housing Authority, and the San Francisco Department of Human Services (DHS).

The SFITTC has created a local network of career-ladder training and support services that integrates and expands previously isolated programs and agencies. Training is tied to industry-identified job needs, and each participant follows a defined career progression strategy that guides his or her path through a series of training courses and work experiences geared toward mastering increasingly advanced job skills in a particular field. Three broad pathways have been established:

1. **Hardware Support**, which includes a training progression beginning with A+ certification, to Network Administration, and advancement into either CISCO or UNIX training.
2. **Office Software Specialization**, which includes beginning, intermediate and advanced Microsoft Office skills.
3. **Web and Digital Media**, an introductory Web course leading to advanced Web and Digital Media training and broad array of skills upgrade opportunities after initial employment.

In 2002, a top priority of the SFITTC will be to develop a unified strategy for creating a true partnership between our training programs and area businesses.

Chair Bunim referred back to the questionnaire results, stating that Members asked do be updated on current projects. She stated that at each meeting there will be a presentation on a sector initiative. She stated that she would like a presentation on the youth sector at the next meeting.

Mr. Nathan Nayman asked for the contact person for the San Francisco IT Consortium. Ms. Feinstein replied that Ernie Rivas from Goodwill Industries would be the contact person.

Mr. William Allen asked if City College would act as a satellite. Ms. Feinstein replied that City College would provide the instructors that will deliver the courses at the CBO sites. Mr. Allen asked what is the projected volume of participants and what will be the graduation rate. Ms. Feinstein responded that in the H1-B proposal, they proposed 600 participants throughout the various courses and predicts a 70 or 80 percent graduation rate.

Chair Bunim asked Pamela Calloway and staff to a list of graduations. She also urged Members to visit the website and encouraged Members that are CBO representatives to invite other members to graduations.

"Snapshot of San Francisco Employment/Unemployment"

Tom Ryan presented an overview of the San Francisco's current economy. The largest group of laid off union members is the hotel and restaurant workers. The number of laid off workers in union hotel hit a high of over 3,000 workers. As part of the Labor Council's efforts to construct a safety net around the laid off workers, both union and non-union, they have been distributing groceries to laid off workers, focusing in the travel and tourism industry primarily. At the last distribution, they passed out 1,000 groceries to the 1,350 who signed up. Their target is unemployed workers with 60% or less of the regular work hours. In attempt to help the "most with need" first, they target workers with expired or no health coverage or those facing eviction.

Mr. Ryan reported that it would be a great service to workers on the edge to have an aggressive program of providing updated information to those who are currently unemployed. He stated that there is a fair amount of confusion around the unemployment claim issue.

Mr. Ryan asked the Board for support in anticipation of layoffs from the hospitality and airport security industry. He would like to hold job fairs, support services to help employers hire, etc. He has begun a series of discussion with agencies such as Jewish Vocational Services, Goodwill's Career Advancement Center, San Francisco Works, and others.

Chair Bunim asked that Mr. Ryan work with Ms. Calloway and Mr. Poremba to solve the "confusion" on unemployment services. She asked that the three entities of the Board commit to sending out information to the public within a week or so.

Ms. Feeley suggested making the funding stream more streamlined. Chair Bunim supported that and asked that Ms. Calloway set up a meeting with Mr. Nayman, Ms. Sandra Hernandez, Ms. Feeley, and herself to concrete the idea of creating a more flexible funding stream.

Chair Bunim stated that in the surveys, some have commented that they felt that the WIB is a rubberstamp. Ms. Bunim reminded the members that the hard work, discussion among members and public, and debate happens at the committee level. She asked the Board members to attend the committee meetings if they had question or comments to the agenda items.

Committee Reports

Rosalie Bulach briefed Members on a recent meeting of the One Stop Committee held on January 30, 2002. Ms. Bulach stated there were no action items on the One Stop Committee agenda; however, the Committee did act on the election of Kathye Citron to the Vice Chair position. Ms. Bulach stated that a request was made of Staff to forward correspondence soliciting responses (within 30 days) from One Stop partners and Consortium members regarding One Stop Memorandums of Understanding. Ms. Bulach explained that the One Stop Committee has also recommended formation of five taskforce to address areas of technology, accessibility, marketing, accountability, and services. Ms. Bulach also explained that the One Stop Committee requested clarification regarding roles and responsibilities of the Consortium Operator, as defined in the Memorandum of Understanding between the Workforce Investment San Francisco Board and the One Stop Operator Consortium.

Trent Rhorer informed the Members that at the last Program Resource Committee (PRC) meeting, the Committee had rich discussion on the two agenda items. The Committee discussed a strategic plan for Workforce Investment Act dollars [Adult Formula Funds] for the Program Year 2002. Mr. Rhorer also mentioned the "rich discussion" involved with considerations of Staff's recommendations for locally recognized credentials for WIA adult and dislocated worker programs. Mr. Rhorer informed the Members that in May, the PRC would have the funding recommendations.

Chair Bunim challenged each of the Members to attend at least one of the PRC meetings.

Dr. Brian Murphy briefed Committee Members on a recent meeting of the Research and Evaluation Committee (REC) held on February 7, 2002. Dr. Murphy explained that, as an action item, Staff recommendations were approved by the REC for compliance data to be used as evaluation criteria for performance of Workforce Investment Act and Welfare to Work subcontractors and passed those recommendations on to the PRC. Mr. Murphy noted that the REC went on record that evaluation criteria for program performance should be incorporated into all subsequent contracts. Mr. Murphy stated that "we were thinking through what ought to be the performance criteria that should have been in the context to begin with." Mr. Murphy described the discussion surrounding the topic of performance criteria as "abstract", and with the consensus of the REC the topic was pushed forward for further cerebration by the Executive Committee.

Nathan Nayman announced that the Empolyer Services Committee met on February 21, 2002, and that no action items could be taken, as a quorum was not present. Mr. Nayman described the struggle that took place with the inception of the Employers and Training Providers Forum. Mr. Nayman explained that the Forum/Conference would bring together two scopes, as two-breakout sessions - one half-day session for smaller businesses and one half-day for medium and larger size businesses. Mr. Nayman stated the Employer Services Committee is trying to determine what the needs are going to be, as the employer community "hopefully" begins to experience the hiring rebound. Mr. Nayman did state that the he anticipates the conference will need to be pushed forward to a later date.

Dan Whooley briefed Members on a recent meeting of the Youth Council held January 31, 2002. Mr. Whooley stated that the Youth Council has adopted staff recommendations for WIA Title ID Youth Opportunity Grant (YOG) Cost Reimbursement Subcontractor funding level and Service Providers, WIA ID (YOG) Individual Referral funding level, and WIA youth vendor list. Mr. Whooley explained that the Youth Council has approved a Memorandum of Understanding for Youth Employment Coordination Project for a Youth Employment Partnership Coalition position. He mentioned that the Youth Council would make an effort to recruit additional members, which would include a youth.

Consent Calendar

Motion to adopt the Consent Calendar was moved by Victor Revenko and seconded by Sandra Hernandez.

Ayes: William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.

Nays: None.

Motion passed.

Executive Committee Recommendations

Ratification of WIA Title 1D Youth Service Subcontractors
Ms. Calloway presented the recommendations for WIA Title 1-D Youth Service Subcontractors and Vendors.

The Executive Committee recommended that $3,016,168 of FY01-02 WIA Title ID (YOG) funds be committed to the specific subcontractors as indicated in Table III with individual contract terms to be negotiated by PIC staff based on need. Estimated $980,000 in FY01-02 funds are recommended to be set aside for individual referrals to qualifying vendors. This recommendation is contingent on the continuing availability of YOG funds in an amount necessary to meet current and future needs and obligations.

In the opinion of the reviewers, the proposals recommended for funding and the amount estimated available for individual referral are responsive to the needs of eligible youth and present a sound strategy for meeting YOG program goals.

Motion to ratify the above recommendations was moved by Brian Murphy and seconded by Trent Rhorer.
Ayes: William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.
Nays: None.
Abstentions: Scott Hauge and Abby Snay.

Motion passed.

Ratification of Proposed Youth Vendor Applications

The Executive Committee further recommended adoption of the vendors designated for approval in Table IV (can be obtained on the PIC website: www.picsf.org) for Youth Program individual referral.

Motion to ratify the Proposed Youth Vendor Applications was moved by Leslie Luttgens and seconded by Dan Whooley.
Ayes: William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.
Nays: None.
Abstentions: Scott Hauge, Curt Kirschner, and Abby Snay.

Motion passed.

President's Report

Ms. Calloway asked the Members, who did not submitted their surveys, to obtain a copy from staff, complete and return it to staff. She thanked those who had turned it in for their rich comments and information. She stated that she looked forward to hearing from everyone.

Ms. Calloway brought the Member's attention to the "Information" tab. In the tab, there are meeting schedules and several articles of interest provided for members to read. She referred to one article regarding Governor Davis and a new state labor agency.

Ms. Calloway asked Raymond Holland to provide a brief, clear, and concise statement about the Annual Disclosure Statements that will be sent to Members soon. Mr. Holland informed the Members that two items would be requested: statement of economic interest and sunshine ordinance declaration. These documents are due on April 1, 2001. He then answered questions from the Members.

Curt Kirschner asked for the definition of economic interest. Mr. Holland replied that a copy of the conflicts code will be provided.

Chair Bunim asked if there were public testimony on non-agenda items. There were none.

Chair Bunim opened the table for discussion among Members on non- agenda items.

Craig King asked Ms. Feinstein, in regards to the IT Consortium presentation, what are the entry requirements and how basic skills deficiencies are addressed? Ms. Feinstein replied that entry-level requirements varied by the level of training the person is pursuing. There are entry-level classes provided by different organizations such as Jewish Vocational Service, Glide, Goodwill and San Francisco Housing Authority.

Abby Snay asked for clarification on the committee roles. She wanted to know why the One Stop Committee made recommendations on the allocations of the grant. Ms. Calloway replied that it would be on the next Executive Committee Agenda.

Scott Hauge announced that State Workforce Investment Board's small business workgroup would be holding a regional forum on June 26th.

Aileen Hernandez requested a presentation of the upcoming TANF reauthorization of what changes might be possible and a separate presentation to address the impact of the CalWORKs. Mr. Rhorer replied that he could present on that issue.

Motion to adjourn meeting was moved by Aileen Hernandez and seconded by Abby Snay.
Ayes: William Allen, Steve Arcelona, Michael Blecker, Rosalie Bulach, Annie Chung, Ann Cochrane, Pamela David, Nicholas de Lorenzo, Mary Edington, E. David Ellington, Teresa Feeley, Corliss Fong, Sally Gallegos, Scott Hauge, Aileen Hernandez, Sandra Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Brian Murphy, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Abby Snay, Dan Whooley.
Nays: None.
Abstentions: Scott Hauge, Curt Kirschner, and Abby Snay.

Motion passed.

4

5/02

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

Date: Wednesday, May 15, 2002
Time: 9:30 a.m. – 11:30 a.m.
Location: SBC Pacific Bell
370 Third Street
Parnassus Hall
San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: Wednesday, May 8, 2002

Proposed Agenda

1. Adoption of the Agenda (Action Item)
2. Adoption of the Minutes for the meetings on November 14, 2001, January 16, 2002 and March 20, 2002 (Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations (Discussion Item)
    a. "Results of Resource Mapping Project" – Kevin Stange
    b. "San Francisco Healthcare Workforce Initiative" – Joel Streicker
    c. "Snapshot of Current San Francisco Employment/Unemployment" – Tom Ryan
5. Committee Reports (Discussion Item)
    a. One Stop Committee
    b. Youth Council
    c. Program Resources Committee
    d. Research and Evaluation Committee
    e. Employer Services Committee
6. Consent Calendar (Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

    a. Proposed Action: Planning Considerations for the Homeless Employment Collaborative Programs
    b. Proposed Action: Ratification of Evaluation Criteria for Homeless Employment Collaborative Programs
    c. Proposed Action: Planning Considerations for Refugee Programs
    d. Proposed Action: Ratification of Evaluation Criteria for Refugee Programs

9. President's Report (Discussion Item)
    a. Presentations:
        i. Annual Reporting and Disclosure Responsibilities of WIB Members
        ii. WIB Member Survey Results
10. Chair's Report (Discussion Item)
11. Public Testimony on Non-Agenda Items (Discussion Item)
12. Future Agenda Items (Discussion Item)
13. Adjournment (Action Item)

**Information enclosed*

***These items are on the May 8, 2002 Executive Committee Agenda for consideration. Information on these items will be mailed and posted on the website after the Executive Committee has taken action.*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

/02

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
LOCAL WORKFORCE INVESTMENT BOARD

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JUN 14 2002
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Date: Wednesday, June 19, 2002

Time: 9:30 a.m. – 11:30 a.m.

Location: Yerba Buena Center for the Arts
701 Mission Street
The Forum
San Francisco, CA 94103

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
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San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

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Issued: Tuesday, June 11, 2002

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Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

Proposed Agenda

1. Adoption of the Agenda (Action Item)
2. Adoption of the Minutes for the meetings of May 15, 2002 (Action Item)**
3. Public Testimony on Agenda Items (Discussion Item)
4. "TANF Reauthorization Update" by Trent Rhorer
5. "Introduction to WISF Board internet tools" (Presenters TBA)
6. Committee Reports (Discussion Item)
    a. One Stop Committee
    b. Youth Council
    c. Program Resources Committee
    d. Research and Evaluation Committee
    e. Employer Services Committee
7. Consent Calendar (Action Item)

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

    a. Proposed Action: Ratification of the Locally Recognized Credentials for Youth Title 1B Formula Programs, WIA

8. Executive Committee Recommendations (Action Items)**
    a. Proposed Action: Ratification of the Funding Recommendations for CalWORKs, Formula WtW and PAES Subcontracts, PY 2002-03
    b. Proposed Action: Ratification of the PY' 2002 WIA Allocations and Proposed Strategic Budget
    c. Proposed Action: Ratification of the Recommended Training Subcontracts, WIA Adult Formula, PY 2002-03
    d. Proposed Action: Ratification of the PY 02–03 Workforce Investment Act Title IB (Formula Funds) Youth Subcontractors
    e. Proposed Action: Ratification of the Continuation of Youth Opportunity Grant Site Service Subcontractors
9. President's Report (Discussion Item)
10. Chair's Report (Discussion Item)
11. Public Testimony on Non-Agenda Items (Discussion Item)
12. Future Agenda Items (Discussion Item)
13. Adjournment (Action Item)

**Information enclosed.*

*****Information will NOT be mailed. The Executive Committee originally scheduled for June 12, 2002 was cancelled due to lack of quorum. The rescheduled date is June 17, 2002. The materials resulting from the meeting will be posted on the website (www.picsf.org) and will be made available at the PIC office located at 745 Franklin Street, Suite 200.***

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9/02

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES OF THE JUNE 19, 2002 MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held in the Forum of the Yerba Buena Center for the Arts located at 701 Mission Street, San Francisco, CA 94105.

PRESENT:
Lynn Bunim, Chair; Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Anni Chung, Ann Cochrane, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay

ABSENT:
Kathye Citron, Kimberly Cousin, Pamela David, Philip Day, Mary Edington, Corliss Fong, Gregg Fortner, Sally Gallegos, Sandra Hernandez, Phyllis Jackson, Andrea Jones, Nate Mason, Brian Murphy, Kes Narbutas, Nathan Nayman, John Poremba, Ave Seltsam, Marion Standish, Erika Thorson-Garay, Stan Warren, and Dan Whooley

STAFF:
Brenda Brown, Jenny Chen, Joyce Crum, Cathy deCristofaro, Wes Dixon, Karen Hart, Raymond Holland, Zenaida Paguirigan, Emma Perez, Adrian Trujillo, Judith Villamor, Steve Weaver, and Clara Wong

PUBLIC:
Sara Bauermeister, Roel Blanco, George Clark, Ruth Cueto, Elizabeth Echols, Devra Edelman, Vanessa Lei, Mark Mak, Maurice May, Glen Nethercut, Ellouise Patton, Chelie Putne, Roy Recin, Ahsha Safai, Gerry Souzis, Kevin Stange, and Sherry Terag

Chair Bunim convened the meeting at 9:35 A.M. A quorum was not established. Ms. Bunim asked for public testimony on agenda items; there was none.

Agenda Item 4 – TANF Reauthorization Update

Trent Rhorer gave a brief update of the TANF reauthorization. He recapped from the last Board meeting where a video clip of both a Democrat and Republican Senator discussed the reauthorization. Mr. Rhorer had disagreed with Senator Clayshaw's inaccurate statements on the need for dramatic changes, particularly changes in criteria.

A recently passed bill, HR 4737, largely reflected the Bush administration's proposal on TANF. The bill addressed three critical areas on work requirement changes that will affect the Board. The first is the overall increase in the percentage of families to engage in federal work activities (from currently 50% to 70% over the next five years). Second is what is allowable for work and what hours are required each week for TANF parents to engage in order to remain eligible for cash benefits. Third is the exemption.

A quorum was established at 9:45 A.M.

Motion to adopt the agenda was moved by Craig Martin and seconded by John Killacky.

Ayes:	**Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay**
Nays:	**None**
Abstentions:	**None**

Motion passed.

Motion to adopt the minutes of the meeting held on May 15, 2002 was moved by Leslie Luttgens and seconded by John Killacky.

Ayes:	**Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay**
Nays:	**None**
Abstentions:	**None**

Motion passed.

Agenda Item 5 – Introduction to WISF Board Intranet Tools

Glen Nethercut gave a brief overview of the current PIC websites. PIC has three websites: the main PIC website, Tax Credit website, and the One Stop website. The first two are active and the third is currently inactive. The PIC's main website (www.picsf.org) was developed in 1998 and has evolved over the years. The website targets all audiences. The website currently has 230 full pages and 350 downloads. The Tax Credit website (www.sftaxcredits.com) was developed in 1997 and has been revised three times. The Tax Credit website targets employers who are looking for tax credit information on federal, state and local levels.

Mr. Nethercut informed the Members that there was interest in developing an intranet for WISF Board and its subcommittees. [www.picsf.org/wisf] The intranet will include all upcoming meetings and events; meeting materials; and rosters of Board, subcommittees and PIC staff. There will also be two special sections: "electing electeds" and "your attention please".

Shelley Bradford-Bell expressed her concern of the readability of the website. Chair Bunim asked Ms. Bradford-Bell to work with Mr. Nethercut and Pamela Calloway to address and solve this issue.

Mr. King suggested that there be a section which announces funding opportunities.

Darlene Rutkowski suggested that there be a page that gives an overview of the subcontractors. She also asked if the website is accessible to the blind and visually impaired. Chair Bunim asked Ms. Rutkowski to work with Mr. Nethercut and Pamela Calloway to address and solve this issue.

Craig Newmark asked if there were any interactive features such as a message board where Members could communicate to each other. Mr. Nethercut replied no, not currently.
Chair Bunim asked if there was public testimony on this agenda item. There was none.

Agenda Item 6 – Committee Reports

One Stop Committee (OSC)
Rosalie Bulach informed the Members that the OSC has met three times to discuss the budget item that will be presented later.

Program Resource Committee (PRC)
Trent Rhorer informed the Members that the PRC has also met three times in order to allow public testimony and discussion of the funding recommendations for WtW and WIA Adult programs. The recommendations will be presented later.

Chair Bunim thanked the Committees for their hard work and dedication.

Agenda Item 7 – Consent Calendar

Locally Recognized Youth Credentials

Motion to adopt the Consent Calendar was moved by Michael Blecker and seconded by Rosalie Bulach.

Ayes: **Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay**

Nays: **None**

Abstentions: **None**

Motion passed.

Before proceeding, Chair Bunim asked the Members to sign the Conflict of Interest Declarations.

Agenda Item 8 – Executive Committee Recommendations

Welfare to Work (WtW) Recommendations
Trent Rhorer presented a brief overview of the WtW recommendations. To view the recommendations, please visit the PIC's website at www.picsf.org.

William Allen referred to the numbers presented in Attachment A and asked if the numbers were reviewed in the decision process. Trent Rhorer replied that the Committee did look at the data but in larger sense (i.e., what services the subcontractor will provide for the amount requested or rewarded).

Motion to adopt the recommendations was moved by Leslie Luttgens and seconded by Craig Martin.

Ayes: **Irene Agnos, William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Nicholas deLorenzo, Aileen Hernandez, Dwayne Jones, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark,**

Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, and Dana Serleth

Nays: None

Abstentions: Shelley Bradford-Bell, Anni Chung, E. David Ellington, Theresa Feeley, Scott Hauge, Craig King, and Abby Snay

Motion passed.

WIA Strategic Budget

Rosalie Bulach gave a brief overview of the budget recommendations. To view the recommendations, please visit the PIC's website at www.picsf.org.

Motion to adopt the recommendations was moved by Rosalie Bulach and seconded by Trent Rhorer.

Ayes: Irene Agnos, William Allen, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, and Dana Serleth

Nays: None

Abstentions: Michael Blecker, Craig King, and Abby Snay

Motion passed.

WIA Recommendations

Trent Rhorer presented a brief overview of the recommendations. To view the recommendations, please visit the PIC's website at www.picsf.org.

Michael Blecker clarified that Swords to Plowshares (STP) has under-performed as of March 30, 2002 but will fulfill their contract at the end of the program year. He suggested that there should be consideration for those who complete at the end of the program year.

Shelley Bradford-Bell expressed her concerns of not funding essential programs like STP and the Family School.

Ann Cochrane suggested that committees provide staff with policy guidelines.

Motion to adopt the recommendations was moved by Leslie Luttgens and seconded by John Killacky.

Ayes: Irene Agnos, William Allen, Rosalie Bulach, Pamela Calloway, Ann Cochrane, Nicholas deLorenzo, E. David Ellington, Scott Hauge, Dwayne Jones, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, and Dana Serleth

Nays: Shelley Bradford-Bell and Aileen Hernandez

Abstentions: Michael Blecker, Anni Chung, Theresa Feeley, Craig King, and Abby Snay

Motion passed.

Title ID Youth Recommendations
Ann Cochrane gave a brief overview of the recommendations. To view the recommendations, please visit the PIC's website at www.picsf.org.

Motion to adopt the recommendations was moved by Victor Revenko and seconded by Craig Martin.

Ayes: **Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Ann Cochrane, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, and Dana Serleth**

Nays: **None**

Abstentions: **Abby Snay**

Motion passed.

Agenda 8E – Continuation of Youth Opportunity Grant Subcontractors

Ann Cochrane gave a brief overview of the recommendations. To view the recommendations, please visit the PIC's website at www.picsf.org.

Motion to adopt the recommendations was moved by Ann Cochrane and seconded by Leslie Luttgens.

Ayes: **Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Ann Cochrane, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay**

Nays: **None**

Abstentions: **None**

Motion passed.

President's Report

Legislative Update
Ms. Calloway gave a brief overview of the legislative update prepared by the California Workforce Association (CWA) on June 13, 2002. She informed the Members that the Assembly Budget subcommittee had appropriated most of the Reed Act funds to the Unemployment Insurance fund for program improvement. The subcommittee appropriates $15 million in Reed Act funds to implement a statewide system for tracking Universal Services; however, the senate has required the California Workforce Investment Board (CWIB) to conduct a study before the $15 million is allocated. In addition, $500,000 of Reed Act funds will be leveraged against $1.4 million received by the Department of Rehabilitation to improve accessibility to the One Stop Center. Ms. Calloway informed the Members that the WISF One Stop Committee Accessibility Workgroup will meet on June 24, 2002 from 9:00 A.M. to 11:00 A.M. at the Career Link Center to discuss the accessibility issue.

H1-B Technical Skills Grant Award
Ms. Calloway informed the Members that, in addition to the previously announced $900,00 IT from the Governor; DOL has announced the award of a $3 million grant to San Francisco for twenty-four months. The IT Consortium will be meeting to discuss the implementation of the awards.

Board Retreat and other Strategic Planning Opportunities
Pamela Calloway directed the Members to the "Save the Date" flyer for the WISF Board Strategic Planning Retreat on July 30, 2002 and asked that Members submit the RSVP slip to Alice Chiu.

Ms. Calloway informed the Members that the CWA and the CWIB co-sponsored a WIB Leadership Summit on May 29-30, 2002 in Sacramento. The San Francisco delegation included: Trent Rhorer, Dwayne Jones, Bill Allen, Scott Hauge, Lynn Bunim, Abby Snay, and Pamela Calloway. At the end of the meeting, Ms. Bunim was asked to present the work product from the local areas to the State Workforce Investment Board. Ms. Calloway informed the Members that those ideas were included in the report for their review.

Announcements

Scott Hauge announced that there would be several Regional Forums in the Bay Area. The purpose of the Forum will be to receive input from the small business community. The Forum will be held on June 26, 2002, from 7:30 A.M. to 11 A.M. at the World Trade Club in San Francisco.

Chair Bunim thanked Clara Wong for her 25 years of hard work and dedication at the Private Industry Council, Inc.

Public Testimony on Non-Agenda Items

Asian Prenatal Advocates (APA)
Sherry Terag informed that the APA was one of the agencies recommended for vendor's status and discontinuation from the Welfare to Work cost-reimbursement program. APA targets the Cantonese and Vietnamese population. She urged the Members to review and restore one of APA's contracts based in the following reasons: APA did achieved the numbers proposed as of March 30th date, enrollments were at 54%, and there were completions.

Chair Bunim noted the request.

Department of Human Services
Kevin Stange announced that the research presented at several previous meetings have been compiled and at near completion. Thanks to the generous donation from the Haas Foundation, the report will be distributed to all Members of the Board by the end of July.

Motion to adjourn meeting was moved by Shelley Bradford-Bell and seconded by Ann Cochrane.

Ayes: **Irene Agnos, William Allen, Michael Blecker, Shelley Bradford-Bell, Rosalie Bulach, Pamela Calloway, Ann Cochrane, Anni Chung, Nicholas deLorenzo, E. David Ellington, Theresa Feeley, Scott Hauge, Aileen Hernandez, Dwayne Jones, John Killacky, Craig King, Curt Kirschner, Leslie Luttgens, Craig Martin, Craig Newmark, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Abby Snay**

Nays: None
Abstentions: None
Motion passed.

The Meeting was adjourned at 11:35 A.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

/02

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

09-04-02 A10:5

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Date:	Wednesday, September 18, 2002
Time:	9:30 a.m. – 11:30 noon
Location:	SBC Pacific Bell Parnassus Hall 370 Third Street San Francisco CA 94107

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AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at http://www.sfgov.org/bdsupvrs/sunshine.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

If you require special accommodation due to a disability, please call Roberta Fazande at 415-923-4265 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

Issued: Friday, August 30, 2002

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

PROPOSED AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, SEPTEMBER 18, 2002

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the June19, 2002 meeting *(Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations (Discussion Items)
    - A. Bay Area Council Survey by Stephen Gotlibe
    - B. City Biz Proposal by Julie Brandt
    - C. Sunshine Ordinance Training by Paul Zarefsky
5. Executive Committee Recommendations (Action Items) *
    - A. Proposed Action: Ratification of Recommendations for Year Seven Funding of the Homeless Employment Collaborative
    - B. Proposed Action: Ratification of Recommendations for Refugee County Plan Goals and FFY 2002 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) Formula Funds
    - C. Proposed Action: Ratification of Budget Adjustment, Workforce Investment Act (WIA) Adult Formula, Program Year 2002-2003
    - D. Proposed Action: Ratification of Supplement Youth Opportunity Grant Individual Referral Set Aside
    - E. Proposed Action: Ratification of Supplemental Vendor List
6. Report: (Discussion Items)
    - A. Employer Services Committee
    - B. One Stop Committee
    - C. Program Resources Committee
    - D. Research and Evaluation Committee
    - E. Youth Council
    - F. WISF Board Strategic Planning Retreat 2002
7. Bylaw Amendments (Discussion Item)
8. President's Report (Discussion Item)
9. Chair's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment *(Action Item)*

* Information will be sent as soon as the Executive Committee makes their recommendations at their meeting on September 11, 2002.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** AUGUST 30, 2002

FROM: PAMELA CALLOWAY

SUBJECT: BYLAW ADMENDMENTS

Several members have expressed the desire for Bylaw amendments. Enclosed for your review, are the current Bylaws of the Workforce Investment San Francisco Board. The Bylaws provide an amendment process in Section 8. It is as follows:

> "The Bylaws may be amended at any meeting of the Members at which a quorum is present by an affirmative vote of a majority of the Members, provided that notice of the intended action is explicit and is included with the materials for the meeting received at least *thirty (30)* days in advance of the meeting."

The Board has two meetings remaining this year: September 13, 2002 and November 20, 2002. Pursuant to the Bylaws and meeting schedule, the following timeline is:

1. A written draft of Bylaw amendments must be received by Alice Chiu no later than 5:00 P.M. on Monday, September 9, 2002. Please include bold or italics as appropriate. All Bylaw amendments received by this date will be circulated to all members and posted on the website. We will discuss them as a discussion item (not an action item) at our September 18th Board meeting,.
2. All written drafts of Bylaw amendments must be received by Alice Chiu no later than 5:00 P.M. on October 1, 2002. All amendments received by this date will be considered as an action item at the November 20, 2002 WISF Board meeting.
3. Amended Bylaws will be mailed to you by October 7, 2002. You should prepare to approve the amendments at our November meeting.

If you have any additional questions, please contact Alice Chiu at (415) 923-4464 or by email at achiu@picsf.org.

Enclosure

BYLAWS
of
Workforce Investment San Francisco

February 1, 2001
(Amended April 11, 2001)

1.0 Name & definitions

1.1 Name
The name of the organization shall be Workforce Investment San Francisco.

1.2 Definitions
The following terms and their definitions shall apply to these Bylaws:

a. The Workforce Investment Act of 1998, 28 USC Sections 2801, et.seq., is referred to herein as "the Act."

b. The certified local Workforce Investment Board of San Francisco is referred to herein as "the LWIB."

c. Individuals who serve on the LWIB are referred to herein as "Members."

d. The secretary of the LWIB is referred to herein as "the Secretary."

h. The Mayor of the City and County of San Francisco is referred to herein as the "the Chief Local Elected Official (CLEO)."

i The working partnership, as described in the Master Partnership Agreement, between the LWIB and the CLEO is referred to herein as the "Partnership."

2.0 Mission Statement

The purpose of Workforce Investment San Francisco (LWIB) is to design and implement a workforce development system that prioritizes scarce employment and training resources in conformance with the Workforce Investment Act of 1998, 29 U.S.C. §§ 2801, et seq. and other appropriate legislative and policy authorities. LWIB shall: 1) create meaningful opportunities for employment skills development; 2) coordinate and enrich workforce development plans and activities with other supportive service needs; 3) integrate current services to provide universal access to career and labor market information; 4) provide quality services and resources to employers, job seekers and other stakeholders to ensure full employment in jobs that pay enough to sustain healthy families; and 5) leverage both public and private resources to fulfill these goals.

3.0 Membership of the Certified Local Workforce Investment Board

3.1 Appointments, number & classes
The Mayor, in conformance with the Act, the certified state and local plans, *appoints members of LWIB* from among individuals meeting membership criteria.

3.2 Classes of voting Members

The LWIB shall be composed of the following classes of voting Members:

a. Representatives of business in the local area who:
   1) are owners of businesses, chief executives or operating officers of businesses and other executives or employers with optimum policy-making or hiring authority;
   2) represent businesses with employment opportunities that reflect the employment opportunities of the local area;
   3) are appointed from among individuals nominated by local business organizations and business trade associations

   A majority of the Members shall be from this class.

b. Representatives of local educational entities including educational agencies, school boards, entities providing adult education and literacy activities, the community college and other postsecondary educational institutions selected from individuals nominated by regional or local educational agencies, institutions or organizations representing such entities.

c. Representatives of labor organizations nominated by local labor federations.

d. Representatives of community-based organizations.

e. Representatives of public and private sector economic development agencies.

f. Representatives of the each of the One-Stop partners as required in the Act.

3.3 Other Members

The Membership of the LWIB may include other individuals or representatives of entities as determined appropriate by the CLEO.

3.4 One Vote

All Members shall have one vote regardless of the number of membership class definitions a member meets. *Votes by proxy or by representatives other than the Member shall not be valid.*

3.5 Appointment

The authority to appoint Members to the LWIB rests with the CLEO and is not a shared function of the LWIB.

3.6 Term of appointment

The regular term of appointment of each Member shall be two (2) years, expiring on January 31. However, the initial term for not more than 50% of the Members, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

3.7 Resignation of membership

Any Member may resign from membership by submitting written notice to the Secretary and to the CLEO at least thirty (30) days prior to the effective date of the resignation.

3.8 Removal from membership

Any Member may be recommended for removal from membership by a vote of two-thirds of the Members present and voting, provided that there is a quorum present and that the notice of the meeting at which the vote is taken included this action on the agenda.

Reasons for removal may include failure to attend at least half of the regularly scheduled meetings of the LWIB during a twelve-month year (February 1 – January 31), or a failure to attend three (3) consecutive meetings without prior notification *to the Chairperson or Secretary* of inability to attend.

Once the LWIB has voted in favor of a recommendation to remove a Member, the following procedures shall be followed:

a. A notice shall be sent by prepaid first class or registered mail to the most recent address of the Member, as shown on the LWIB's records, setting forth the action to be taken, the reasons for the action, and the date, time and place of the hearing provided for in this section. Such notice shall be sent at least fifteen (15) days before the proposed effective date of termination.

b. The Member proposed for removal shall be given an opportunity to be heard, either orally or written, at a hearing to be held not fewer than five (5) days before the effective date of the proposed termination. The hearing will be held before the LWIB.

c. Following the hearing, the LWIB shall decide whether or not the Member should be removed. The decision of the LWIB shall be final.

3.9 Vacancies

If a vacancy should occur through normal expiration of the term of appointment or for other reasons, a replacement will be appointed by the CLEO. Where the vacancy is in an unexpired term, the appointment shall be for the remainder of the term.

3:10 Annual Statement of Economic Interests

Members have the duty of submitting to the Secretary*, upon their appointment to the LWIB, and annually during their membership,* a completed and signed Statement of Economic Interests and any other documents required by federal, state or local laws governing conflicts of interests.

4.0 Officers of the Certified Local Workforce Investment Board

4.1 Number of Officers

The Officers of LWIB, Inc shall consist of a Chairperson, Vice Chairperson, Secretary and Treasurer. A Member who is also a representative of business must fill the office of Chairperson. Any class of Member may fill the office of Vice Chairperson. The office of Secretary may be filled by a Member or from the Staff. The LWIB may also have other Officers as may be appointed by the Executive Committee, or with authorization from the Executive Committee, by the Chairperson or some other Officer.

4.2 Chairperson

a. The Chairperson shall be appointed by the CLEO, from among the members described in Section 3.2.a., and elected by LWIB. The Chairperson shall preside at all meetings of the Executive Committee and the LWIB.

b. The CLEO and Chairperson shall make all appointments to Executive Committee, and the Youth Council, the authority for which is not otherwise designated in the Act. The Chairperson shall make appointments to other committees.

c. The Chairperson shall serve as an ex-officio member of all committees, *with full voting privileges.*

d. The Chairperson shall approve signatories for bank accounts and contracts.

4.3 Vice Chairperson

The Vice Chairperson shall act in the place and stead of the Chairperson in the event of the Chairperson's absence, inability or refusal to act, and when so acting shall have all the powers of, and be subject to all the restrictions upon, the Chairperson.

4.4 Treasurer

The Treasurer shall be responsible for fiscal monitoring and oversight.

4.5 Secretary

Unless otherwise determined by the Executive Committee or the President, the Secretary shall have the following powers and duties:

a. The Secretary shall attend all meetings of the LWIB and the Executive Committee and shall record all votes and the minutes of such meetings, to be kept at all times in accordance with state and local public meeting laws. The Secretary shall provide for the recording of all votes and proceedings of Standing Committees.

b. The Secretary shall at all times keep the original copy of the agendas and minutes of LWIB and Executive Committee meetings, Bylaws and other business records of LWIB.

c. The Secretary shall give *and document* such notices as required by state and local public meeting access laws *and* these Bylaws.

5.0 Committees of the Certified Local Workforce Investment Board

5.1 Guiding principles

a. The Standing Committees shall:
   1. Conduct public hearings and take public testimony when needed to ensure that all viewpoints are considered, and in all cases when required by statute or regulation.
   2. Provide the LWIB with readily available expertise regarding the policies and direction of the LWIB.

3. Review staff recommendations with appropriate public hearings and advise the LWIB and the Executive Committee regarding action to be taken.
4. Provide for broad community participation in LWIB activities.

b. Members of the Committees who are not Members of the LWIB as set forth in section 3.0, above, shall be voting members of the Committee, but shall not be voting members of the LWIB.

c. It shall be the responsibility of each committee to establish its schedule for meeting and to ensure that all interested parties are provided with adequate notice of such schedules in conformance with public meeting laws. Committee Chairpersons may delegate such responsibilities to Staff.

5.2 Executive Committee

The Executive Committee shall be comprised of not more than eleven (11) Members of LWIB. The total number of Members appointed, if less than eleven (11), shall be either seven (7) or nine (9). This committee shall review the work plans of other committees, ensure coordination of the work of all committees and hear reports on their progress. This committee is authorized to act on behalf of LWIB *and all action taken on behalf of LWIB shall be subsequently presented to LWIB for consideration.* This committee shall hear, review and refer matters for action from other committees to LWIB as a Consent Calendar item, see Section 7.2. This Committee shall serve as the Board of Directors of the non-profit corporation, Private Industry Council, Inc.

5.3 Research and Evaluation Committee

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than five (5) and not more than seventeen (17).

The Evaluation Committee shall be responsible for the review and advice to the Executive Committee and the LWIB of the overall quality of programs authorized by the LWIB. This committee shall advise the LWIB in developing a robust capacity driven by federal mandates, best practices and employer needs through analysis and assessment of programs for job seekers and employers, capacity of service providers, relative success and significance of interventions to move people in San Francisco to high skill, high wage employment.

5.4 Program Investment Committee

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than five (5) and not more than seventeen (17)

The Program Investment Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of funding recommendations for programs and services for adult job-seekers. This Committee shall develop, approve and recommend design and solicitation criteria for adult job-seekers. Subcommittees of the Program Investment Committee shall be appointed at the discretion of the LWIB Chairperson and this committee Chairperson and may include special populations, e.g. refugees, homeless persons.

5.5 Youth Council

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The membership of the committee shall be not less than fifteen (15) and not more than twenty-nine (29) The Youth Council shall be appointed by the LWIB in cooperation with the CLEO, and.shall include:

a. Membership
  1. members of the LWIB with special interest or expertise in youth policy;
  2. representatives of youth service agencies, including juvenile justice and local law enforcement agencies;
  3. representatives of local housing authorities;
  4. parents of youths seeking assistance form LWIB programs;
  5. individuals, including former participants, and representatives of organizations, that have experience relating to youth activities;
  6. representatives of the Job Corps, as appropriate.
  7. other individuals or representatives of entities as determined appropriate by the LWIB in cooperation with the CLEO.

b. Duties
  1. Develop portions of the Local Plan relating to eligible youth;
  2. Subject to approval of the LWIB and in conformance with the requirements of the Act:
     (a) develop, approve and recommend the design and solicitation criteria for youth services and activities; and
     (b) conduct oversight with respect to the eligible providers of youth activities.
  3. Coordinate youth activities as authorized in the Act
  4. Other duties determined appropriate by the Chairperson of the LWIB.

5.6 Employer Services

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than seven (7) and not more than eleven (11)

This committee shall focus on San Francisco's changing industry and occupational structure, identify sectors in the forefront of San Francisco's growth and assess their service and workforce needs. Coordinate and plan delivery of business services including tax credits, First Source Hiring, and labor market information. Design methods and practices to engage employers in the publicly financed workforce delivery system including: customized training, career ladder skills training, and criteria for "work-ready" job seekers. This committee shall also prepare recommendations to LWIB and the Executive Committee concerning marketing and public relations of the workforce development system to employers.

5.7 One-Stop Operations

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than eleven (11) and not more than fifteen (15)

This committee shall be the planning committee of One-Stop San Francisco (OSSF), the local One-Stop System. This committee shall monitor operations of OSSF and prepare recommendations to LWIB and the Executive Committee concerning the allocation of scare resources to and between: operation of facilities (centers and satellite locations); operation of systems (technology, personnel staffing and training); and operation of job-seeker training (cost reimbursement contracts and/or individual referral contracts). This committee shall be responsible for recommendation of Memoranda of Understanding with One-Stop Partners as required by the Act. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL) and for development of marketing strategies for OSSF.

5.8 Other committees

From time to time, the Executive Committee may establish Ad Hoc Committees or Task Forces to accomplish specific projects. The need for such committees will be determined by the Executive Committee, along with their composition, membership and structure.

5.9 Term of appointment

Unless otherwise specified in the request to serve as a member of any committee, the term of appointment will be one (1) year. Each year, after the election of Officers of the Council, the Chairperson shall review all committee assignments and will issue new letters of appointment.

6.0 Meetings of the LWIB & Executive Committee

6.1 Regular meetings

a. LWIB: Regular meetings of the LWIB shall occur at least once in each calendar quarter, i.e., February, April, June, September and November of 2001. Executive Committee meetings may be held in conjunction with meetings of the LWIB. The future schedule of meeting dates and locations may be determined by the Executive Committee will be published annually no later than November 30. Notice of any change to scheduled dates and locations will be delivered to Members at least ten (10) days in advance of the meeting.

b. Executive Committee: The Executive Committee shall meet at least six (6) times per year.

c. Other Committees: Other Committees shall establish a regular meeting schedule in accordance with its particular function.

6.2 Special meetings

a. LWIB: A special meeting of the LWIB may be called by the Chairperson or by the Executive Committee. In addition, five percent or more of the Members may call a special meeting of the Members for any lawful purpose.

b . Executive Committee: The Chairperson, the Vice-Chairperson or any two Directors may call special meetings of the Executive Committee. The President after consultation with at least one Director may also call a special meeting.

6.3 Notice of meetings

Notices of LWIB or Executive Committee meetings shall include the date, time and location of the meeting as well as an agenda containing a brief, concise and non-technical description of items to be considered. In addition, the agenda or its attachments shall include: the general nature of a proposal, if any, to take action when approval of the Members is required, amendment of these Bylaws, and such other matters, if any, as may be expressly required by state and local public meeting laws.

a. Regular meetings

Written notice of all regular meetings of the LWIB or Executive Committee shall be sent to Members not less than seven (7) days before the date of the meeting, provided the notice is mailed with first-class postage, or by facsimile or e-mail. Any such notice shall be deemed to have been given at the time when delivered personally or deposited in the mail or sent by other means of written communication.

b. Special meetings

A written notice of the time and place of special LWIB or Executive Committee meetings shall be delivered personally to each Member by facsimile or e-mail, telegraph or first-class mail, with the charges prepaid, addressed to the Member as it is shown on such records of the LWIB, or, if it is not so shown on such records or is not readily ascertainable, at the place at which the meetings of the LWIB are regularly held. In case such notice is mailed, it shall be deposited in the United States mail at least four (4) days prior to the time of the holding of the meeting. In case such notice is delivered personally by facsimile or e-mail, it shall be so delivered at least seventy-two (72) hours prior to the time of the holding of the meeting.

c. Public notice

The Secretary shall mail copies of notices for all regular and special LWIB or Executive Committee meetings to interested parties, and see that the notices are posted in the San Francisco Public Library, on the Private Industry Council, Inc. website and in a location freely accessible to members of the public at least seventy-two (72) hours before the meeting.

Explanatory documents referred to in the notices will be made available for public inspection at the LWIB and Private Industry Council, Inc. office during normal business hours, and posted on the Private Industry Council, Inc website with the agenda.

6.4 Quorum

No enforceable action may be taken at a meeting that lacks a quorum.

a. Constitution of a quorum

1. LWIB: At all meetings of the LWIB, presence of fifty percent of the membership shall constitute a quorum, provided that at least half of those present are business representatives.

2. Executive Committee: The presence of a majority of the Members at a meeting of the Executive Committee shall constitute a quorum.

b. Failure to achieve a quorum

When a quorum is not achieved, the LWIB or the Executive Committee may not take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

6.5 Public testimony on agenda items

Time shall be set aside on the agenda at the beginning of a LWIB or Executive Committee meeting for public testimony concerning matters on the published agenda for the meeting. The Chairperson may limit time for the public testimony to three (3) minutes per individual.

6.6 Public testimony on other matters

Time shall be scheduled on the meeting agenda, after conclusion of other business and prior to adjournment, for public testimony on matters appropriate to the responsibilities of the LWIB but not stated on the agenda. The Chairperson may limit time for the public testimony to three (3) minutes per individual.

6.7 Action on items not on the agenda

Action shall not be taken at any meeting on items not on the agenda except in emergencies or unless Members find that failure to act would threaten serious injury to the public interest. The Executive Committee shall adopt a resolution specifying the nature of the emergency or the threat of serious injury to the public interest, and shall offer members of the public in attendance the opportunity to give testimony.

7.0 Voting by Members

7:1 Procedure

All Members may make motions and vote except as restricted by these Bylaws. Each Member shall be entitled to one vote on each matter submitted to a vote of the LWIB or to a committee.

Voting at a meeting of the LWIB or Executive Committee may be by voice, show of hands or by ballot.

7.2 Consent Calendar

The Executive Committee shall present recommendations for action to the LWIB on a Consent Calendar. Each Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration.

7.3 Force

If a quorum is present, the affirmative vote of a majority of the voting power represented and voting at the meeting (which affirmative vote also constitutes a majority of the required quorum) shall be the act of the Members, unless the vote of a greater number, or the same number after disqualifying one or more Members from voting, is required by federal, state or local law, or these Bylaws.

7.4 Restrictions

a. No Member shall vote on, or participate in the discussion, concerning any portion of a plan, a contract, a subcontract, or any other matter regarding the provision of services by such Member, or an entity represented by such Member, or that would provide financial benefit to the Member or to the immediate family of such Member.

b. No member may engage in any other activity determined by the Governor to constitute a conflict of interest as specified in the State Workforce Investment Plan.

c. No Member may engage in any other activity that would violate federal, state, of local conflict of interest laws.

7.5 No Abstentions

All Members are required to vote unless excused from voting by a motion adopted by a majority of the Members present, or unless voting on the matter would violate the restrictions of Section 7.3 of these Bylaws.

8.0 Amendments to & matters not addressed in the Bylaws

The Bylaws may be amended at any meeting of the Members at which a quorum is present by an affirmative vote of a majority of the Members, provided that notice of the intended action is explicit and is included with the materials for the meeting received at least *thirty (30)* days in advance of the meeting.

Matters not discussed in the Bylaws will be resolved under the provisions of Robert's Rules of Order.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DOCUMENTS DEPT.
SEP 17 2002
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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, September 18, 2002

Time: 9:30 a.m. – 11:30 a.m.

Location: SBC Pacific Bell
Parnassus Hall
370 Third Street
San Francisco CA 94107

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

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(Chapter 67 of the San Francisco Administrative Code)

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Friday, September 13, 2002

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WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, SEPTEMBER 18, 2002

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* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** SEPTEMBER 11, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: PRC RECOMMENDATIONS FOR YEAR SEVEN (OCTOBER 1, 2002 to SEPTEMBER 30, 2003) OF THE HOMELESS EMPLOYMENT COLLABORATIVE (Agenda Item 5A)

The Workforce Investment San Francisco (WISF) Board is asked to approve funding recommendations for Year Seven of the Homeless Employment Collaborative (HEC).

The Executive Committee met today, solicited public testimony, and reviewed and approved the Program Resources Committee's (PRC) recommendations. I am forwarding the Executive Committee's recommendations to you for your ratification.

BACKGROUND

On May 15, 2002 the WISF Board approved evaluation criteria for determining Year Seven funding for the ten (10) existing HEC subcontractors. In summary these criteria were:

1. HEC subcontractors' program performance will be judged on the basis of the results accomplished in the first nine months of Year Six (October 1, 2001 to June 30, 2002).
2. Nine-month data on actual outcomes versus planned nine-month contract goals will be reviewed. Data of the HEC subcontractors' performance for the previous twelve-month period (Year Five) will also be available.
3. Acceptable program performance is 70% of the sum of the subcontract goals scheduled to be accomplished by June 30, 2002.
4. In addition, the HEC subcontractors will present a Self-Evaluation Report (the contents of which were to be determined with their consultation) to explain their program and their achievements or lack thereof.

BUDGET CONSIDERATIONS

The approved HEC budget for Year Six is:

DHS Administration		$25,260	(2.4%)
PIC Administration		$25,260	(2.4%)
PIC Personnel Costs (1.5 fte)		$98,005	(9.2%)
PIC Operating Costs		$2,278	(0.2%)
HEC Subcontractors		$843,770	(79.5%)
Arriba Juntos	*$148,261*		
Catholic Charities	*$24,651*		
Central City Hospitality House	*$69,569*		
Community Housing Partnership	*$102,974*		
Episcopal Community Services	*$143,935*		
Goodwill Industries	*$47,326*		
Mission Hiring Hall/SOMEC	*$72,225*		
No. California Service League	*$112,050*		
Swords to Plowshares	*$78,019*		
Toolworks Inc.	*$44,760*		
HEC Participant Support		$66,326	(6.3%)
Total:		**$1,060,899**	**(100%)**

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: *411@picsf.org*

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

RECOMMENDATIONS

The data reported, verified and recorded as of June 30, 2002, for the current HEC subcontractors in regard to actual results versus planned nine-month goals indicates the following:

Subcontractor	Percent of Plan
Arriba Juntos	**92%**
Catholic Charities	**71%**
Central City Hospitality House	**100%**
Community Housing Partnership	**83%**
Episcopal Community Services	**86%**
Goodwill Industries	**87%**
Mission Hiring Hall/SOMEC	**116%**
No. California Service League	**102%**
Swords to Plowshares	**79%**
Toolworks Inc.	**81%**

Note that three subcontractors achieved or exceeded their nine-month subcontract goals and seven reached or exceeded the 70% acceptable performance standard. The Collaborative as a whole achieved **91%** of its nine-month combined subcontract goals.

The Executive Committee recommends that all ten HEC subcontractors be funded for Year Seven at the same level that they were funded for in Year Six as indicated in the budget presented above (all met or exceeded the target 70% acceptable performance standard).

The Executive Committee recommends that the entire Year Six budget as indicated above be approved for Year Seven.

cc: HEC Subcontractors
PIC Staff

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** SEPTEMBER 11, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR AC for LB

SUBJECT: EXECUTIVE COMMITTEE RECOMMENDATIONS FOR FFY 2002 COUNTY PLAN GOALS AND REFUGEE EMPLOYMENT SOCIAL SERVICES (RESS) AND TARGETED ASSISTANCE (TA) FORMULA FUNDS (Agenda Item 5B)

The Workforce Investment San Francisco (WISF) Board is asked to approve County Plan goals and an expenditure plan for Federal Fiscal Year (FFY) 2002 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) formula funds.

The Executive Committee met today, solicited public testimony, and reviewed and approved the Program Resources Committee's (PRC) recommendations. I am forwarding the Executive Committee's recommendations to you for your ratification.

COUNTY PLAN DESIGN AND GOALS

Design

Planning considerations for refugee programs were previously discussed at Board meetings in April and May 2002, where it was agreed that the currently available activities and programs are sufficient and appropriate, and therefore the issuance of another Request For Proposals (RFP) was not needed. (An RFP had been issued in 2001.)

The Executive Committee recommends no substantial changes to the refugee program design or County Plan, which include all of the services and activities that are currently provided and offer a wide latitude to fund programs given sufficient resources.

Goals

The following table contains the State-approved FFY 2001 goals and proposed FFY 2002 goals. The goals are estimates based upon historical performance data and current economic conditions. Definitions for the measures are listed after the table. Although we would like to raise our goals each year and encourage continual improvement in performance, **the Executive Committee recommends** that the prudent course during these uncertain economic times is to leave the goals unchanged.

	FFY 2001	FFY 2002
Employment Entry Rate	57%	57%
Cash Assistance Termination Rate	60%	60%
Cash Assistance Reduction Rate	40%	40%
Average Hourly Wage	$10.00	$10.00
Employment Retention Rate (90 days)	75%	75%
Entered Employment with Health Benefits Rate	75%	75%

Entered Employment (full/part time) is defined as "the entry of an active participant into unsubsidized employment for at least one day during the quarter." Full-time is 35 hours or more per week. The measure is calculated by dividing the number of refugees placed in jobs by the number enrolled.

Cash Assistance Terminations due to Earnings
The closing of a refugee recipient's cash assistance case – either TANF or Refugee Cash Assistance (RCA) or General Assistance (GA) – due to the refugee's earned income from employment. Calculated by dividing the number of refugees who have their cash assistance terminated by the number of refugees on cash assistance who were placed in jobs.

Cash Assistance Reductions due to Earnings
A reduction in the amount of a refugee's cash assistance due to earned income from employment. Calculated by dividing the number of refugees who have their cash assistance reduced by the number of refugees on cash assistance who were placed in jobs.

Employment Retention
Employed on the 90th day (after original job entry) at any unsubsidized job; a measure of continued participation in the labor market, not retention of a specific job.

Entered Employment with Health Benefits
A measure of how many jobs offer health benefits, either at placement or within six months of employment. Calculated as a percentage of full-time jobs.

Target Population

The Executive Committee recommends that the target population reflect the five-year arrival data shown below from the RPB and the five-year service data on **Attachment 1** (purple) from the Central Intake Point (CIP).

ARRIVALS OCTOBER 1996 – SEPTEMBER 2001

Country/Region of Origin	#	%
Former Soviet Union	1,870	54%
Bosnia/Eastern Europe	1,166	34%
China/Southeast Asia	257	7%
Middle East	71	2%
Africa	65	2%
Other	24	1%
Total	3,453	100%

PROGRAM PERFORMANCE

The Research & Evaluation Committee recommended and the WISF Board adopted the following criteria for evaluating current refugee formula-funded subcontractors' performance:

- The time period evaluated will include the prior fiscal year's program, which began October 1, 2000, and the first nine months of the current fiscal year, October 1, 2001 to June 30, 2002.
- The goals in the Refugee County Plan will be used as performance standards, and agencies that fail to meet these standards will be expected to offer some explanation in their quarterly narrative reports. (However, these goals only apply to employment programs; they do not apply to acculturation programs or to the CIP. The CIP has no numerical goals; acculturation programs only have a numerical goal for enrollments.)
- Changes in the job market should be taken into consideration; in a good year, we should expect more, in a recession, less.

- Specific measures are: Actual versus planned enrollments and placements and actual entered employment rate, retention rate, and percentage of jobs with health benefits for the FY 2000 program, and actual versus planned enrollment and placement data for the first nine months of this year.
- Agencies' quarterly narrative reports on their nine-month program performance should also be taken into consideration.

The PRC reviewed subcontractor performance statistics on the approved performance measures for the last fiscal year and for the first 9 months of this fiscal year. The Committee also reviewed subcontractor quarterly narrative reports.

FY 2000 (October 1, 2000 through June 30, 2002)
Combined, the current employment programs enrolled 232 of a planned total of 263 (88%), placed refugees in 177 of a planned 183 jobs (97%), and achieved a 65% employment rate with an average hourly wage of $11.08. Sixty-seven percent of full-time jobs had health benefits, and 83% of the refugees placed were still working 90 days later. We exceeded the County Plan goals for all but one (health benefits) of these measures.

All of the employment programs, except Jewish Vocational Service's (JVS) Employment Services (ES) program for refugees 50 years of age and older, exceeded the 57% employment rate goal in the County Plan.

International Institute's (IISF) acculturation program enrolled 194 refugees, exceeding its enrollment goal of 187.

FY 2001 (October 1, 2001 through June 30, 2002)
Currently, the employment programs have enrolled 159 of a planned 177 (90%), placed refugees in 56 of a planned 88 jobs (64%) with an average hourly wage of $12.23. Ninety-three percent of full-time jobs have health benefits so far this year.

International Institute's (IISF) acculturation program has enrolled 86 of 90 planned refugees, and Jewish Family & Children's Services (JFCS) has enrolled 41 of 72 planned. This is JFCS's first year contracting with the PIC for acculturation services.

FUNDING
The table below shows FFY 2002 preliminary funding with a comparison of the FFY 2001 preliminary, final, and current subcontractor funding with FFY 2000 carry forward funds added. PIC administration funding is not in this table. There is a **38% decrease** between current subcontractor services funding and what is preliminarily available for programs and services starting October 1, 2002.

	2001 Preliminary	2001 Final	2001 with carry forward	2002 Preliminary	2002 Final
TA	**$508,285**	**$508,259**	**$611,152**	**$400,642**	**?**
RESS	**$179,734**	**$182,150**	**$196,853**	**$102,265**	**?**
TOTAL	**$688,019**	**$690,409**	**$808,005**	**$502,907**	**?**

Program Funding Recommendations
The Table on **Attachment 2** displays each of the programs arranged by activity to facilitate comparisons between them, and includes costs per person, preliminary funding amounts for FFY 2001, current funding levels, and initial Executive Committee recommendations for FFY 2002 funds. The service levels for those programs recommended for funding have been adjusted based on the dollar amount being recommended. The recommended placements are based on the planned program placement rates. The funding recommendations represent an across the board cut of current subcontractors' initial 2001 funding after deleting both Individual Referral (IR) programs. Because the IR programs were eliminated, each of the remaining programs will experience only a 12.6% funding reduction from initial funding last year. In comparison, the PIC will see a 30% cut in administration funds.

Funds distribution per activity
The following chart shows FFY 2001 initial funding distribution between the activities with a comparison of the FFY 2002 recommendation.

Activity	FFY 2001	FFY 2002
CIP	12%	15%
ES	44%	50%
VT/CA	18%	22%
IR/OJT	16%	0%
A/SAS	7%	9%
Transp/Childcare	3%	4%

CIP	Central Intake Point
ES	Employment Services
VT/CA	Vocational Training/Career Advancement
IR/OJT	Individual Referral/On-the-Job Training
A/SAS	Acculturation/Social Adjustment Services

Attachments

cc: Refugee Subcontractors
Dan Crawford, CDSS/RPB
DHS, PIC Staff

CIP Refugee Population

by Aidtype, Country of Origin, Age and SPL

ATTACHMENT 1

where application date between 7/1/97 and 6/30/02

	AFDC/TANF	RCA	OTHER	Total
Country of Origin				
Former Soviet Union	220	379	292	891
Bosnia/Eastern Europe	51	43	42	136
China/S.E.A.	31	95	20	146
Middle East	8	12	15	35
Cuba/Central Am.	1	9	7	17
Africa	2	16	30	48
Total	313	554	406	1273
Age Group				
Age 21 and younger	3	67	38	108
Age 22 to 40	205	218	181	604
Age 41 to 49	83	72	91	246
Age 50 and older	22	197	96	315
Total	313	554	406	1273
SPL				
SPL 0	55	139	14	208
SPL 1	9	50	7	66
SPL 2	17	66	14	97
SPL 3	28	60	40	128
SPL 4	42	49	44	135
SPL 5	48	50	70	168
SPL 6	68	53	89	210
SPL 7	26	44	104	174
NoSPL	20	43	24	87
Total	313	554	406	1273

ATTACHMENT 2

EXECUTIVE COMMITTEE FFY 2002 PRELIMINARY REFUGEE FUNDING RECOMMENDATIONS

Agency	Activity	Cost per Person*	Initial FFY 2001 Funding	Current FFY 2001 Funding**	Initial FFY 2002 Recom. Funding	TA	RESS	Recom. Svc.	Recom. Plc.	Place. Rate
International Rescue Committee	CIP	$452	$85,862	$92,422	$75,050	$73,050	$2,000	NA	NA	NA
Catholic Charities/REAP	ES	$1,850	$92,500	$107,300	$80,852	$80,852	$0	44	29	65%
Jewish Vocational Service	ES	$2,468	$197,440	$197,440	$172,577	$172,577	$0	70	46	65%
Catholic Charities/REAP	Broker	$1,867	$18,670	$18,670	$0	$0	$0			80%
Jewish Vocational Service	Broker	$1,899	$18,990	$18,990	$0	$0	$0			80%
Jewish Vocational Service	VT-IT	$4,468	$62,552	$107,232	$54,675	$0	$54,675	12	10	80%
Jewish Vocational Service	VT-OTC	$4,408	$66,120	$119,016	$57,794	$57,794	$0	13	10	80%
International Institute of San Francisco	A/SAS	$295	$35,000	$35,000	$30,593	$0	$30,593	{104}		
Jewish Family & Children's Services	A/SAS	$165	$15,885	$15,885	$13,885	$0	$13,885	{84}		
Subtotal			$593,019	$711,955	$485,426	$384,273	$101,153	139	95	68%
IR/OJT Set Aside			$75,000	$75,000	$0	$0	$0			
Transportation/Childcare			$20,000	$21,050	$17,481	$16,369	$1,112			
Total		$3,618	$688,019	$808,005	$502,907	$400,642	$102,265			
PIC Administration			$126,267	$126,690	$88,748	$70,701	$18,047			
Grand Total			$814,286	$934,695	$591,655	$471,343	$120,312			

*Broker costs do not include training vendor or OJT employer costs.

**Current FFY 2001 funding includes carry forward FFY 2000 funds.

Activity	Description
CIP	Central Intake Point - 15%
ES	Employment Services - 50%
VT/IT	Vocational Training/Information Technology - 11%
VT/OTC	Vocational Training/Office Technology & Communication - 11%
A/SAS	Acculturation/Social Adjustment Services - 9%
Transportation/Childcare - 4%	

IRC - International Rescue Committee
JVS - Jewish Vocational Service
CC/REAP - Catholic Charities - Refugee Employment Assistance Program
IISF - International Institute of San Francisco
JFCS - Jewish Family & Children Services

AGENCY TOTALS	
IRC	$75,050
JVS	$285,046
CC/REAP	$80,852
IISF	$30,593
JFCS	$13,885

9/11/02

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** SEPTEMBER 11, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: BUDGET ADJUSTMENT, WIA ADULT FORMULA, PY'2002 (Agenda Item 5C)

The Workforce Investment San Francisco (WISF) Board is asked to approve an adjustment to the budget for third year funding of the Adult formula program of the Workforce Investment Act (WIA) for the current Program Year (July 2002 through June 2003).

The Executive Committee met today, solicited public testimony, and reviewed and approved the Program Resources Committee's (PRC) recommendations. I am forwarding the Executive Committee's recommendations to you for your ratification.

BACKGROUND

At its meeting of June 17, 2002 the Executive Committee considered a recommendation from its One Stop Committee to set aside $500,000 in WIA funds for technology development. After extensive testimony, the Committee reduced the technology set aside to $200,000. Its action "returned" $300,000 to the three WIA allocations (Adult, Dislocated Worker, and Youth) for program use:

WIA **Adult** Share	WIA DWP Share	WIA Youth Share	Total Share
162,021	189,756	148,223	500,000
-97,213	-113,853	-88,934	-300,000
64,808	75,903	59,289	200,000

The effect of this return was to make an additional $97,213 in Adult funds available for obligation. The Executive Committee budget, approved on June 17, lists this amount as set aside for "immediate redistribution by the PRC."

RECOMMENDATION

On August 6, the Program Resources Committee voted to distribute the returned $97,213 in Adult formula funds among the following activities:

- $50,000 to augment the OJT Pool for Employer Reimbursements, and
- $47,213 in subcontract funds to Swords to Plowshares for –14 OJT participants.

The table on the next page shows the final PY'01 distribution compared to PY'02 funds as currently recommended.

WIA Adult Training Allocation

Comparison of PY'2001 and PY'2002 WIA Adult Training Distribution

Recommended by Program Resources Committee, Aug. 6, '02	**PY'2001** 7/01/01- 6/30/02	# Enrollments	**PY'2002** 7/01/02- 6/30/03	# Enrollments
Computer & Office Technology				
Goodwill Industries (GWI)	$ 18,168	10	**$ -**	
Mission Lang. & Voc. School (MLVS)	$ 86,945	29	**$ 86,945**	29
Intercultural Institute of California (IIC)	$ 102,350	27	**$ 102,350**	27
San Francisco Vocational Services (SFVS)	$ 52,959	11	**$ 52,959**	11
Constructions & Cabinet Making				
Asian Neighborhood Design (AND)	$ 67,671	17	**$ 67,671**	17
Young Community Developers (YCD)	$ 65,666	15	**$ 65,666**	15
Food Preparation Service				
Haight Ashbury Food Program (HAFP)	$ 47,693	10	**$ 47,693**	10
Ella Hill Hutch Community Center (EHH)	$ 43,375	11	**$ -**	
Health Careers				
Self Help for the Elderly (SHE-HHA)	$ 34,652	9	**$ 34,652**	9
Arriba Juntos (AJ)	$ 96,906	24	**$ 96,906**	24
Housekeeping				
Self-Help for the Elderly (SHE)	$ 156,401	42	**$ 156,401**	42
Job Readiness Training				
The Family School (TFS)	$ 51,018	15	**$ -**	
On-the-Job Training				
No. Calif. Service League (NCSL)	$ 84,705	24	**$ 84,705**	24
Arriba Juntos (AJ)	$ 84,277	29	**$ 84,277**	29
Jewish Vocational Service (JVS)	$ 26,194	10	**$ -**	
Swords to Plowshares (STP)	$ 65,461	19	**$ 47,213**	14
Contracts Subtotal	$ 1,084,441		**$ 927,438**	
OJT Set Aside Pool (Employer Reimbursements)	$ 175,000		**$ 133,335**	
Part. Support Pool (Transportation, Childcare)	$ 153,303		**$ 83,334**	
I.R. Pool - New Initiative Fund	$ -		**$ 83,335**	21
Undistributed			**$ -**	
Total Training Cost	$ 1,412,744	302	**$ 1,227,442**	272

PY 2000 Funds Carried Into PY 2001= $172,541

cc: Members, Workforce Investment San Francisco Board
WIA Adult Subcontractors

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** SEPTEMBER 11, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: ALLOCATION OF 1 MILLION DOLLARS OF PROGRAM YEAR 02-03 YOUTH OPPORTUNITY GRANT (WIA Title ID) FUNDS TO SUPPLEMENT INDIVIDUAL REFERRAL SET ASIDE (Agenda Item 5D)

The Workforce Investment San Francisco (WISF) Board is asked to approve the allocation of 1 million dollars of WIA Title ID funds to supplement individual referral set aside.

The Executive Committee met today, solicited public testimony, and reviewed and approved the Youth Council's recommendations. I am forwarding the Executive Committee's recommendations to you for your ratification.

BACKGROUND

On February 13, 2002 the Workforce Investment San Francisco Board ratified the January 31, 2002 Youth Council action to dedicate $980,000 in PY 01-02 Youth Opportunity Grant (YOG) funds for individual referrals to qualified vendors. To date $767,911 has been obligated or expended for individual referrals and approximately $200,000 in requests is pending. The five-year Youth Opportunity Grant is funded at seven million dollars for the first two years, 5.25 million dollars for the third and fourth years, and 3.5 million in the final year.

DISCUSSION

The YOG program is now operating at close to a full expenditure rate, yet start up salary savings and other savings resulted in a surplus. While program funds can be carried forward from one year to the next and are carefully planned to meet projected expenditures, sufficient funds exist to supplement the individual referral set aside.

The individual referral program of Youth Opportunity San Francisco (YO!SF) has proved to be highly successful, supporting a range of youth development and vocational training activities in a highly efficient manner with low administrative cost. With the guidance of their Youth Development Specialist, individual referrals allow youth to select and participate in the programs or services best suited to their own plan and goals.

RECOMMENDATION

Executive Committee recommends that $1,000,000 in FY 02-03 WIA Title ID (YOG) funds be added to the $980,000 in FY 01-02 set aside for individual referrals to qualified vendors.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** SEPTEMBER 11, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (Agenda Item 5E)

The Workforce Investment San Francisco (WISF) Board is asked to approve that the vendors listed on Table I be added to the youth vendors list.

The Executive Committee met today, solicited public testimony, and reviewed and approved the Youth Council's recommendations. I am forwarding the Executive Committee's recommendations to you for your ratification.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco (WISF) Board, ratified the Youth Council's action. On December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002 the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001 without a due date.

DISCUSSION

RFQ is a process to identify and competitively select providers of specified services for individual referral at a quoted price. The use of an individual referral approach for securing youth services allows Youth Opportunity San Francisco (YO! SF) staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process described above asked organizations to submit Statements of Qualifications. Each statement is reviewed, and if competitive and eligible to receive federal funds and provide the service(s) described, is recommended for placement on a vendors list.

Since June 27, 2002, additional potential vendors have submitted Statements of Qualifications.

RECOMMENDATION

Staff has reviewed all Statements of Qualifications submitted to the PIC since July 10, 2002 and determined the vendors to be eligible to receive WIA Title ID Funds. The Executive Committee recommend that the vendors listed on Table I be added to the youth vendors list. In addition, the Executive Committee requested a staff report on YOG-funded individual referrals to include: use by Enterprise Community, age of youth, school status, as well as vendor and subcontractor utilization for the purpose of discussing criteria for the distribution of individual referral resources

Attachment

YOUTH COUNCIL
RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
TITLE 1D YOUTH OPPORTUNITY GRANT (YOG)
INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
138 to 141	**Save Our Loved Ones (SOLO)** 86 Reddy Street, SFCA 94124 Darlene Franklin - 415/822-4945	Job Readiness and Job Placement with emphasis on Multi-Media Program - Web Design, Audio Video Production, Web Hosting, Theatrical Training, etc. (3 month cycles)	$1,918.75	**YES**
142	**Young Scholars Program** 1551 Newcomb Ave. #102, SFCA 94124 Jacqueline Rushing - 415/920-5072	Project RISE - Realizing the Importance of Self-Sufficiency through Education: Guidance and Counseling, College Admission/Dollars for Scholars Program, SAT Prep, College Tours, Leadership.	$4,561.34	**YES**
143	**sf Learns** 731 Douglas St. SFCA 94114 Laura Critchfield - 415/647-2445	Bayview LEARNS - paid work experience, leadership development, supportive services, adult mentoring, comprehensive guidance & counseling (30 week program)	$4,999.00	**YES**
144	**Mission Hiring Hall** 288 - 7th Street, SFCA 94103 Don Marcos - 415/865-2105	MHH-WEP(Work Exposure Program)Job Readiness, Job Skills Training, Work exposure period, Job Placement & Retention. Prepress/Multi-Media, Construction Administration, Hotel/Hospitality Training, Fitness Trainer Certification & Construction Trades Apprenticeship Tutorial program.	$6,136.36	**YES**
145	**Fit For Living, Inc.** 10 Monterey Blvd. SFCA 94131 J. Anthony Narducci - 415/536-1615	Comprehensive Fitness training model to improve health and self-care knowledge along with an improvement in the general health, vitality, physical fitness and emotional well being and to develop an impact on social skills and academic performance of participants.	$75/hr	**YES**
146	**OpNet - Community Ventures, Inc.** 965 Mission St., Suite 518, SFCA 94103 Elizabeth Echols - 415/882-1555	**Entry Level** - Information Technology and Multi-media. Train students on technical & job readiness skills, offers career development services w/ 2-4 month paid internship and direct employment in the Information Technology Industry	$6,000.00	**YES**
147	**OpNet - Community Ventures, Inc.** 965 Mission St., Suite 518, SFCA 94103 Elizabeth Echols - 415/882-1555	**Advance Level** - Information Technology and Multi-media. Train students on technical & job readiness skills, offers career development services w/ 2-4 month paid internship and gain access to a well paid career in the Technology Industry	$6,000.00	**YES**
148	**Every Child Can Learn Foundation** 220 Montgomery Ste.1050 SFCA 94104 Dana Serleth - 415/955-5790	**Mission Accomplish -** Comprehensive academic tutoring, career exploration activities, adult and peer mentoring, and guidance and counseling. Place youth in high-quality work-based learning opportunities & monitor progress, work with CBOs	$3,500.00	**YES**
149	**Every Child Can Learn Foundation** 220 Montgomery Ste.1050 SFCA 94104 Dana Serleth - 415/955-5790	**Mission Accomplish -** Comprehensive academic tutoring, career exploration activities, adult and peer mentoring, and guidance and counseling. Place youth in high-quality work-based learning opportunities & monitor progress. Employment opportunities linked to STC pathways.	$4,500.00	**YES**
150	**Instructional Access, Inc.** 6800 Indiana Ste 260 Riverside,CA 92506 John Katsacoulas 909/341-8982	Occupational Skills Training - Word, Excel, PowerPoint, Internet Access, - Skill Attainment, Job readiness, life skills training, peer to peer mentoring, and sports and recreation. In addition, participants receive a computer, software, and printer.	$2,375.00	**YES**
151	**Precita Eyes Muralists** 2981 24th Street, SFCA 94110 Susan Cervantes - 285-2287	Designing and painting community murals. Plan and design traditional mural and spray-can mural projects and learn technical skills in design, color theory, and color mixing. Workshops are conducted 3 times a wk - 7 hrs, project completed in 6 months.	$2,000.00	**YES**
152	**San Francisco State University** 425 Market Street, SFCA 94105 Craig Abaya - 415/405-3311	**Multi-Media Studies -** Practical and Academic training in digital video production and post production. Comprehensive coverage of business and marketing as well as technical and creative skills needed to be successful in the industry. 9-4pm/4-6days/wk for 16 weeks	$13,500.00	**YES**

8/16/02

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20/02

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date: Wednesday, November 20, 2002
Time: 9:30 a.m. – 11:30 a.m.
Location: Yerba Buena Center for the Arts
Forum
701 Mission Street
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Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
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Issued: Thursday, November 14, 2002

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
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PROPOSED AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, NOVEMBER 20, 2002

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the September 18, 2002 meeting *(Action Item)***
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations
   - A. WISF Board's Goals and Accomplishments by Pamela Calloway
   - B. WISF Board's 2002-2003 Research Plan and Update by Kevin Stange*
5. Committee Reports (Information Items)
   - A. Employer Services Committee
   - B. One Stop Committee
   - C. Program Resources Committee
   - D. Research and Evaluation Committee
   - E. Youth Council
6. Executive Committee Recommendation (Action Items)*
   - A. Proposed Action: Approval of Bylaw Amendments
   - B. Proposed Action: Approval of Additions to Supplemental Vendor List
7. President's Report (Discussion Item)
8. Chair's Report (Discussion Item)
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Agenda Items (Discussion Item)
11. Adjournment *(Action Item)*

* Information enclosed.

** Information to be sent.

Workforce Investment San Francisco
Research and Evaluation Committee

Research Plan
2002-2003 Program Year

Draft: November 7, 2002

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Please direct all comments on this research plan to Kevin Stange at 415-557-6569 or kevin_stange@ci.sf.ca.us

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  - Workforce Development Needs 6
  - Outcome Assessment 7
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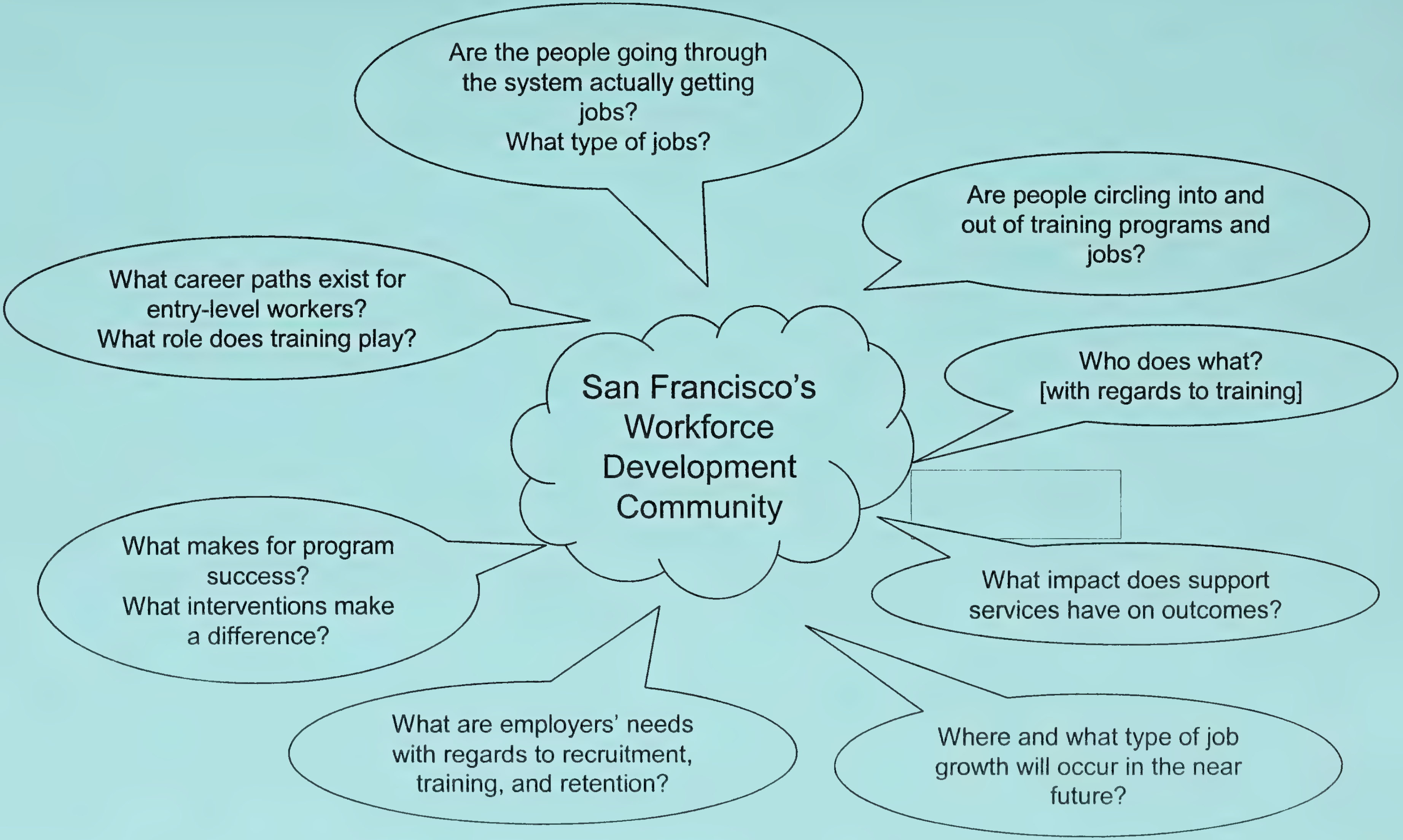
Research Agenda Motivation

San Francisco's workforce development community has posed many important questions....



San Francisco's Workforce Development Community

Are the people going through the system actually getting jobs? What type of jobs?

Are people circling into and out of training programs and jobs?

What career paths exist for entry-level workers? What role does training play?

Who does what? [with regards to training]

What makes for program success? What interventions make a difference?

What impact does support services have on outcomes?

What are employers' needs with regards to recruitment, training, and retention?

Where and what type of job growth will occur in the near future?

Research Plan Mission and Goals

Mission Statement

To ensure that members of San Francisco's workforce development community are provided with the economic and labor market information and research needed to make informed decisions.

Goals for Program Year 2002 - 2003

- Develop a shared knowledge base about San Francisco's workforce development system and needs
- Build more efficient and effective linkages between labor supply and demand
- Promote and enable information-driven workforce development planning and decision-making

Research Project Overview

Major Projects	Description	Research Products	Questions answered
Resource mapping	Describe the major components of San Francisco's workforce development system (CBOs, Comm College, Employers, Unions, Private Schools)	**#1-6.** Research briefings on each of major components of WD system and the system as a whole	• Who does what? [with regards to training]
Workforce development needs	Identify local employer needs and construct a "dashboard" to regularly report these needs to the workforce development community	**#7.** Background report on SF economic and occ. base **#8.** Industry cluster report **#9.** Report on qualitative employer skill needs **#10.** Quarterly "dashboard"	• What are employers' needs? • Where and what type of job growth will occur in the near future?
Outcome assessment	Conduct an extensive cross-program assessment of placement, earnings, retention, and mobility of WISF clients	**#11a.** "Pilot" outcome assessment using existing data **#11b.** Proposal for larger assessment	• Are clients getting jobs? • What kinds of jobs? • Are they keeping them? • What interventions work?
Career paths	Identify and profile career paths available to low-income individuals in San Francisco	**#12.** Report describing lower-skilled career paths	• What career paths exist? • What role does/can training play? • How should tiered training programs be structured?

Project Detail: Resource Mapping

What

#1 through #6: 5-10 page research reports on each of the five major components (see below) of San Francisco's workforce development system and on the system as a whole

Topics covered in each report
- What training and employment services are provided?
- How much? (number of providers, dollars spent, people served)
- To whom? By whom? How?
- How can WISF further support these programs?

Uses include orientation of WISF members and identification of system-wide gaps and redundancies

Scope: Five major components of San Francisco's Workforce Development System

Community Organizations	***Employers***	***Unions***	***Community Colleges***	***Proprietary Schools***
Data Source: • *CBO survey*	Data Sources: • *Existing research* • *Employer forums*	Data Sources • *Existing research* • *Local union survey*	Data Sources: • *Directly from CCSF, SFSU, UC Ext*	Data Sources • *CBO survey* • *ETPL, CTEP, BPPVE*
Status: 100% completed	Status: 100% completed	Status: 0%	Status: 10%	Status: 25%

Project Detail: Workforce Development Needs

What

#7. Research report describing the city's economic and occupational base through analysis and synthesis of historical, current, and projected labor market data

#8. Industry cluster analysis to identify local economic growth areas and the workforce needs likely to arise from this growth.

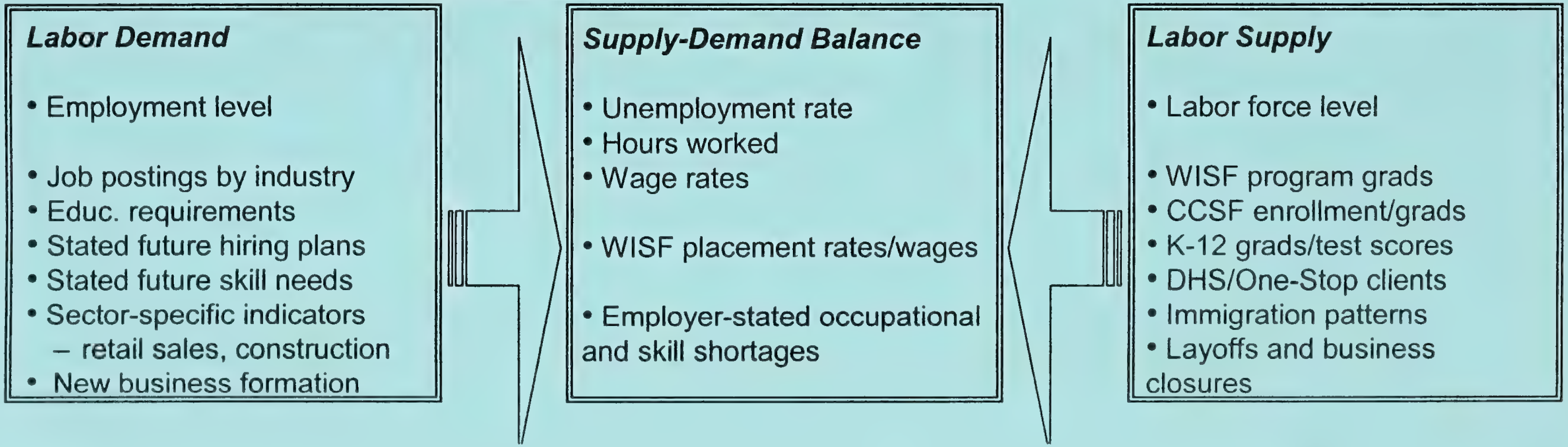
  - Commissioned by SF Center for Economic Development (SFCED)
  - Scheduled to be completed April 2003

#9. Research report describing qualitative skill needs, hiring processes, and participation in the workforce development system by San Francisco employers.

  - Summarize findings from employer forums and previous employer surveys
  - Employer services survey of employers

#10. Quarterly newsletter synthesizing up-to-date local labor market information including labor demand, supply, and supply-demand balance (i.e., a "dashboard" of labor market indicators, see below for model). Newsletter will be distributed to public and presented quarterly to WISF members.

Sample "Labor Market Dashboard"



Labor Demand

- Employment level

- Job postings by industry
- Educ. requirements
- Stated future hiring plans
- Stated future skill needs
- Sector-specific indicators
  - retail sales, construction
- New business formation

Supply-Demand Balance

- Unemployment rate
- Hours worked
- Wage rates

- WISF placement rates/wages

- Employer-stated occupational and skill shortages

Labor Supply

- Labor force level

- WISF program grads
- CCSF enrollment/grads
- K-12 grads/test scores
- DHS/One-Stop clients
- Immigration patterns
- Layoffs and business closures

Project Detail: Outcome Assessment

What

#11. A comprehensive assessment of client outcomes in San Francisco's workforce development system

- Start with a "pilot" assessment to establish basic facts and evaluate outcomes using existing data
- Commission outside research organization to perform more extensive evaluation, using "pilot" findings to guide proposal for outside grant funding
- May require rationalization of PIC databases and data collection practices in the long term

Four phases of outcome assessment

Focus of "pilot"

1. **Establish facts** about outcomes
2. **Evaluate outcomes**
   - Which facts indicate "successes?"
   - Which facts indicate "problems?"

Focus of grant-funded research

3. **Explain** successful and problematic outcomes
   - policy interventions
   - short-term economic fluctuation
   - long-term structural factors
4. Develop **policy recommendations**
   - What policy responses will improve outcomes?

Key facts to establish during "pilot" phase

- Who gets jobs? (What are the characteristics of those that get jobs versus those that don't?)
- What kinds of jobs do they get? (location, occupation, industry, benefits, pay)
- How long do they stay in those jobs?
- What is their history of career progression over time?

Sources: PIC, CBO, DHS, CCSF, EDD data

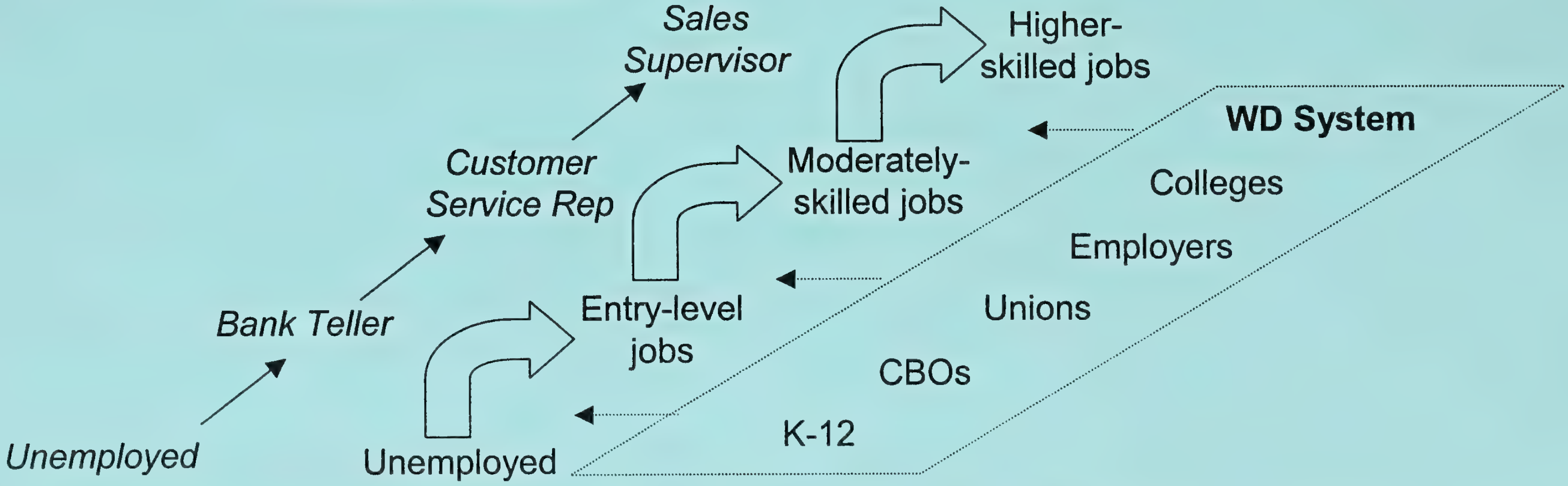
Project Detail: Profile of Career Paths

What

#12. Report which identifies and profiles career paths for low-income workers in San Francisco
- Emphasis on the role of local training institutions in promoting career progression
- Could be used by consortium of agencies to develop tiered training programs
- Could feed into or be conducted in coordination with sector initiatives

Profile of career paths

Banking Example


Unemployed

Bank Teller

Customer Service Rep

Sales Supervisor

Unemployed

Entry-level jobs

Moderately-skilled jobs

Higher-skilled jobs

WD System

Colleges

Employers

Unions

CBOs

K-12

Info Sources

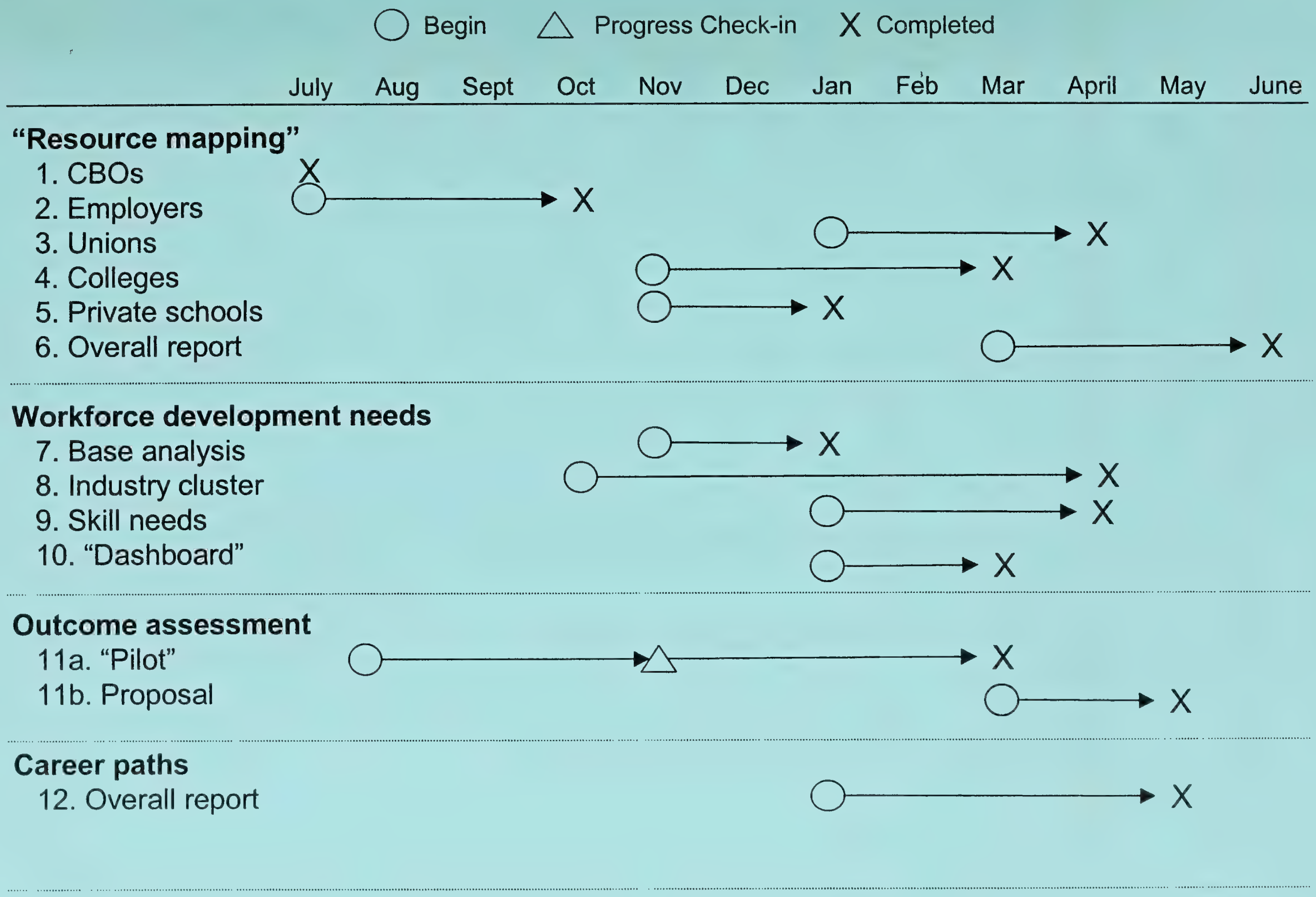
- Reports by EDD, CTI, SFITTC, SFW, DHS, others
- “Resource Mapping” reports

Research Oversight and Partners

Research and Evaluation Committee will oversee progress against overall research plan; other committees will guide projects on a day-to-day basis

Major Projects	Recommended WIB Committee Oversight	Key Partners
1. "Resource mapping"	Program Resources	• CCA/CBOs • Labor organizations • Colleges (CCSF, SFSU, UC)
2. Workforce development needs	Employer Services	• EDD • SF Chamber/SFCED • MOED • CA WIB • One-Stop Network
3. Outcome assessment	Research & Evaluation	• PIC • EDD • CCSF • Outside research organization
4. Career paths	Program Resources	• EDD • Others?

Recommended Research Timeline



Note: Actual timing of research is to be determined by responsible WISF committee or workgroup.

Other Topics For Consideration

Other topics identified as important for WISF to consider, but not included in research plan

1. Information infrastructure
- Examine the need for and options to create a more productive system for collecting and using client and program information
- Answer: “What outcome information do we know?” and “What do we need to know?”
- Work of One-Stop Committee Technology Workgroup should consider research data issues

2. Other local workforce development models
- Examine the workforce development models used by comparable cities
  - relationship between education, public, business, labor, and non-profit organizations
  - identify the benefits and drawbacks of different models

3. Return On Investment (ROI) for workforce development
- Quantify the economic benefits that result from the city’s investment in workforce development (such as the previously used “Benefit/Cost Factor”)
- Communicate this benefit to the local policy and business community

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WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Research Brief: Employer Provided Training

A Publication to Inform
San Francisco's Workforce Development Community
October 2002

Executive Summary

This research brief provides a quick overview of employer-provided training in San Francisco. It first summarizes several "facts" about employer-provided training, then highlights two main concerns these facts raise for WISF, and concludes by identifying several policy responses for San Francisco.

FACTS

- At 2% of payroll, San Francisco employers directly spent about $620 million training their employees in 2000, providing formal training to about half of all workers and informal training to nearly all.
- High-level job skills training (managerial, computer, professional/technical) and basic company orientation and safety training are the most common. Employers rarely provide basic or remedial skills training.
- Employer-provided training disproportionately targets higher-skilled, better educated, higher-paid individuals.
- Larger firms in skill intensive industries (FIRE, TCPU, public admin, and healthcare) are the most likely to provide training, particularly those with generous benefits packages and low turnover.
- Training is overwhelmingly delivered by in-house staff, with for-profit firms and contractors being the preferred outside training vendors.

INSIDE Page

FACTS:
How much? 2
What type? 3
Who receives it? 4
Who provides it? 4
How is it delivered? 5

POLICY CONCERNS 6

POLICY RESPONSES 7

POLICY CONCERNS FOR WISF

! *Employers do not typically provide career advancement training for lower-skilled workers.*

! *Public training resources are infrequently used by employers.*

WISF POLICY RESPONSES

1. Direct support for lower-skilled incumbent worker training
    - *Employer Training Panel (ETP) funding*
    - *Revise WIA eligibility*
    - *Develop shared and on-job accessible curriculum for employers*
    - *Support OJT and customized training*

2. Encourage more employer investment
    - *Retention support*
    - *Help standardize certification and advancement paths*
    - *Measure and communicate return on investments in lower-skilled training*

3. Fill training "gaps" where employer incentives are ineffective (e.g., basic, remedial, and language skills)

4. Make public training programs more accessible and known to employers and determine and communicate their value.

Research Briefs are prepared periodically to inform Workforce Investment San Francisco Board (WISF) members and the public about relevant workforce development topics. This research was made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services. Please direct all comments and inquiries to Kevin Stange, Research Analyst for WISF. Phone: (415) 557-6569; Email: Kevin_Stange@ci.sf.ca.us.

Introduction

Training provided or supported by employers – whether formal or informal, provided directly by employers or through outside vendors – is one of the most significant means through which workers acquire skills. This research brief provides an overview of employer-provided training in San Francisco.

While no systematic research has been conducted specifically about the training provided and supported by San Francisco's employers, significant research has been done at the national and state level, that can provide a starting point for understanding San Francisco. This report relies primarily on this body of research at the national level. It describes the extent and type of training provided by employers, who gets it, who provides it and how, and concludes by discussing several implications for Workforce Investment San Francisco.

"Facts" About Employer-Provided Training

How much training do employers provide?

Over their careers, workers receive much – if not most – of their job skills training at the workplace. Consequently, employer-provided and financed training is one of the most sizable and widespread form of training by almost any measure. Several US-wide studies of employer-provided training[1] found that

- **70% of all employers** provide formal training (1993)
- Employers spent about **2% of payroll** in 2000 on direct training expenditure[2]
- **35-65% of all workers** receive formal training (1993)
- Workers spent **20-60 hours per year** in formal training (1995)

If San Francisco reflects these national characteristics, approximately 22,000 San Francisco employers will have spent $620 million to provide formal training to somewhere between 210,000 and 390,000 workers in 2000.[3] By all three of these measures, employer-provided training dwarfs the amount and extent of training provided by community organizations and City College of San Francisco.

While most research has focused on formal training (training planned in advance with a defined curriculum) informal training is even more substantial. One study found that nearly all employers provide and nearly all workers receive some sort of informal training while on the job. Workers were estimated to spend **two to three times as much time receiving informal training as through formal classes.**[4]

While no systematic research on the recent training practices specifically of San Francisco employers exists, the city's concentration in higher-skilled occupations and industries suggests that it may provide slightly more training than the national average.[5] While SF is likely to maintain this advantage, a recent poll by the Bay Area Council indicates that training spending may have slightly slowed recently.[6]

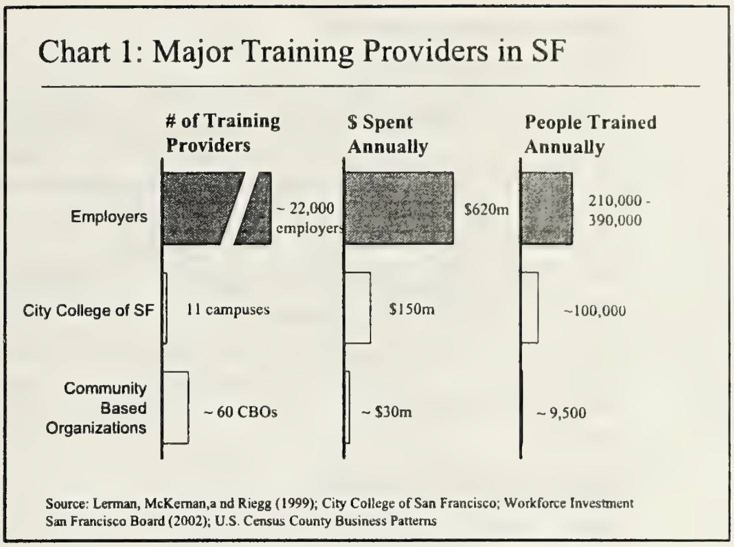


Chart 1: Major Training Providers in SF

Source: Lerman, McKernan,a nd Riegg (1999); City College of San Francisco; Workforce Investment San Francisco Board (2002); U.S. Census County Business Patterns

What type of training is provided?

Formal training takes two general forms. *Job skills training* extends employee skills in a way that improves their ability to do a specific job often at a specific company. In contrast, *general skills training* provides workers with knowledge or skills that are valuable in any number of jobs and possibly with other companies. Common types of general skills training are basic employee orientation and occupational safety, diversity, and basic or remedial skills training.

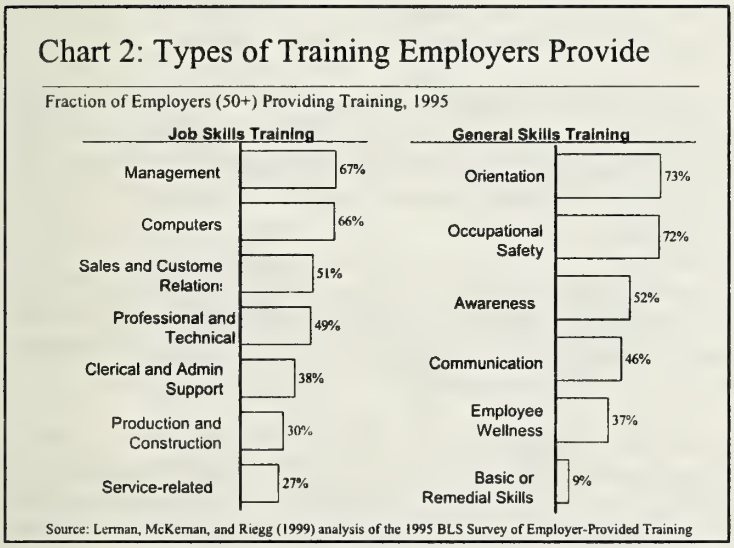


Chart 2: Types of Training Employers Provide

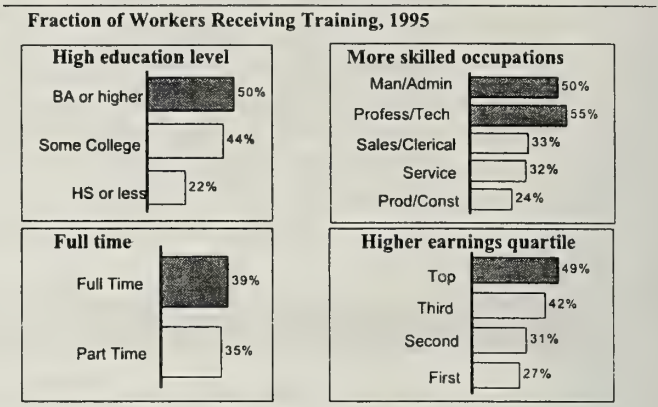
Source: Lerman, McKernan, and Riegg (1999) analysis of the 1995 BLS Survey of Employer-Provided Training

Job skills training – particularly management, computer, sales and customer service, and professional/technical training – is the most common type, provided by half or more of employers. Formal job skills training for line-level skills such as clerical/admin support, production, construction, and service-related skills is much less frequent. Orientation and occupational safety are the most common type of general training, provided by nearly three-quarters of employers. Strikingly, all studies of employer provided training have found that employers rarely provide basic or remedial skills training, including English language training, to their employees.[7]

Who receives training?

The characteristics of training recipients largely reflects the types of training employers provide. Studies of employer provided training have consistently found that more educated, higher paid individuals working in full-time higher-skilled jobs are the most likely to receive training – often by a large margin. For instance, half of all college graduates receive training from their employers. In contrast, only 22% of workers with no college experience and only 27% in the first earnings quartile do.

Chart 3: Characteristics of Training Recipients



Source: Lerman, McKernan,a nd Riegg (1999) analysis of the 1995 National Household Education Survey

Who provides training?

Training practices differ significantly between employers. Differences in size, industry, human resource practices, and turnover rate are often associated with different levels of formal training.

- **Larger firms** are able to spread the fixed costs of training across more workers – generating economies of scale – and are more likely to provide formal training to workers. In fact, firms with 1000 or more employees are 24% more likely to provide formal training than firms with 20-50 employees.

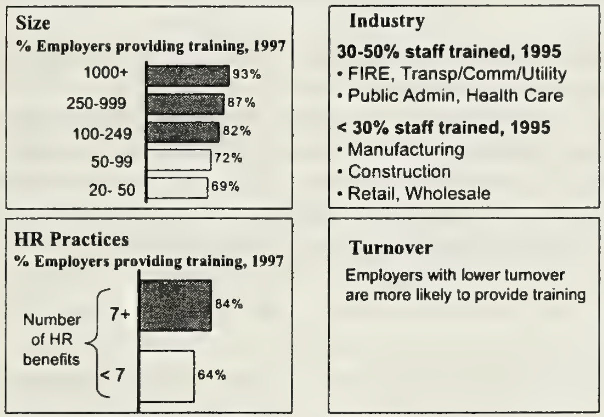
- **Skill-intensive industries** such as finance, insurance, and real estate (FIRE), transportation, communication, and public utilities (TCPU); public administration; and health care provide formal training to greater shares of their workforces. Retail and wholesale trade and, to a lesser extent, manufacturing and construction provide training to fewer of their workers.

- **Firms that offer more benefits** such as paid vacation, paid sick leave, health insurance, family leave, and child care benefits are also more likely to provide formal training. Many employers appear to use training as one component of a broader positive human resource strategy to attract , grow, and retain the best workers.

- **Firms with low turnover** are slightly more likely to provide formal training, and to more workers, than employers with high rates of turnover. Economic theory suggests that high turnover will act as the primary deterrent for firms to provide training because employers won't reap the benefits of training if their staff leaves. While evidence generally supports this notion, turnover does not appear to be the primary factor in whether a firm provides training.

How is training delivered?

Chart 4: Characteristics of Firms Providing Training

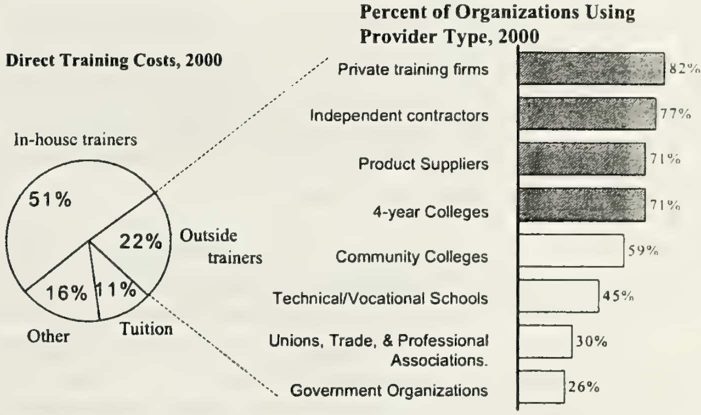


Source: Lerman, McKernan,a nd Riegg (1999) analysis of the 1997 National Employer Survey and the 1995 National Household Education Survey

The majority of employers' direct training expenditure is spent on **in-house training staff**. This fact is consistent with one primary goal of employer-sponsored training – providing employees with the company-specific knowledge and skills needed to do their job. In-house staff's knowledge of company policies, technology, and processes may make them best suited to provide company-specific training to employees.

Employers also look to **outside training vendors** to provide a substantial share of their training. Approximately 22% of direct training expenditure is spent in this way. Private, for-profit organizations such as private training firms, independent contractors, and product suppliers are the most popular. Training offered on a contract basis by public and not-for-profit entities such as community colleges, unions, and government organizations are less frequently utilized. Employers also support employee skill development by reimbursing tuition for their employees. Tuition reimbursement accounts for approximately ten percent of direct employer investment in training.

Chart 5: How Workplace Training is Provided



Source: American Society for Training and Development (2002)

Workforce Policy Concerns and Responses

This brief look at the training practices of employers highlights two main concerns for San Francisco's workforce development community. Firstly, while employer investment in training is substantial – both in terms of dollars spent and employees affected – this training on its own does not appear to provide a basis for career advancement for lower-skilled workers. Secondly, many employers do not use the public training resources available to them. This section elaborates on both of these issues, then describes several responses to address them. [8]

WISF Policy Concerns

! ***Concern:*** *Employers do not typically provide career advancement training for lower-skilled workers.*

Employer training generally targets higher-skilled jobs and rarely addresses the basic or remedial skill needs of many low-income individuals. Lower-skilled workers do tend to receive company orientation and safety training, but this does not provide a basis for career advancement. In contrast, many higher skilled individuals receive management, IT, and other professional training to facilitate their advancement. Faced with these facts, some have concluded that without some policy intervention, workplace training will continue to contribute to growing inequality in the United States.[9]

Why?

The economic benefits to employers of providing lower-skilled training, and training in general, is well documented.[10] So why aren't more companies doing it? Simply put, several barriers currently stand in their way. WISF can encourage more lower-skilled training by helping to remove these barriers, the most significant of which are:

- *Direct costs.* Many employers don't explicitly say that costs are a detriment to their provision of training. However, since human capital investment is accounted for as a cost, rather than an asset, for-profit employers will always face pressure to reduce costs through less training. Training is particularly costly to small firms who lack sufficient scale.

- *High opportunity cost of workers' time (due to nature of work).* Many lower-skilled workers, such as machine operators, receptionists, and bus drivers must spend all of their time in one physical location due to the nature of their work. Releasing workers for training during their shift is often not an option – the opportunity cost (lost production) is simply too high.

- *High turnover* among lower-skilled jobs prevents employers from benefiting from the skills their workers receive through training. Consequently, employers just do not provide the training in the first place.

- *No perceived benefit from investing in lower-skilled workers.* Many employers are simply not aware of the economic consequences of their training practices. In contrast, the few employers that actually do provide extensive training to their lower-skilled employees are conscious of the benefits to their bottom line (lower turnover and improved customer satisfaction and product quality).

! ***Concern:*** *Public training resources are used infrequently by employers*

Employers primarily use private training firms and contractors to fill their outsourced training needs. While training provided by colleges (4-year and community) are used with some frequency, other publicly-supported programs – vocational schools, unions, and direct government training programs – are not. A recent study supports this finding locally: only 22% of CBO-run training programs in San Francisco provided customized training for employers and only 14% received financial support from employers to provide training.[11] Since employer participation in public programs prevents duplication and makes training relevant to employer needs, this low uptake is concerning. Lower-skilled workers, who are the primary participants in public training programs, have the most to lose from ineffective or irrelevant public training.

Why?

Employers' preference for private training providers may reflect the differences in the type of training offered by public vs. private entities. Public entities may be less likely to provide the type of highly-skilled training needed by employers. As evidence, one study found that firms that provide extensive training to lower-skilled workers tend to use public training providers more than other firms do.[12]

In addition, many publicly-funded training programs are not known or immediately accessible by employers. Since the passage of the Workforce Investment Act in 1997, the public workforce development system has slowly evolved to serve employers in addition to low-income job seekers, its historic customer base. Until this evolution is complete and publicly-funded training providers are truly employer-facing, many will remain unknown and unused by employers.

WISF Policy Responses

San Francisco's workforce development community can take several steps to alleviate these concerns. WISF can and should directly support employer-provided training for lower-skilled incumbent workers and make it easier for employers to do more of it themselves. Where such incentives cannot be created, WISF should fill important training needs directly. WISF should also increase the utilization of public training resources by employers through improved program accessibility and visibility.

1. Direct support for lower-skilled incumbent worker training

The most straightforward WISF response to the disparity in employer-provided training is for WISF to directly support lower-skilled incumbent worker training financially by:

- *Helping employers obtain Employer Training Panel (ETP) funding.* The California Employer Training Panel is one of the few programs that specifically funds customized worker training for incumbent and soon-to-be hired workers. It remains largely unknown and underutilized by San Francisco employers.

- *Revising WIA income eligibility levels to accommodate the working poor* would existing public training resources more accessible to lower-skilled incumbent workers.

- *Helping support and facilitate the creation of shared and accessible curriculum* (especially for small employers). WISF can reduce employers' training costs (direct and opportunity) by facilitating the development of curriculum that can be shared across employers and accessed without disruption to workers' jobs

- *Continuing to support WIA on-the-job training (OJT) and customized training programs*, possibly through the WIA New Initiatives Fund.

2. Encouraging more employer investment in training

In addition to bearing some of the lower-skilled training costs directly, WISF can also make it easier for employers to do more of it themselves by removing or mitigating several of the barriers identified earlier.

- *Employee retention programs* that reduce turnover help employers see the benefit of their investment, providing incentives for them to do more of it.

- *Developing a standardized certification and advancement system* that incorporates both formal and informal training decreases the uncertainty of future benefits from training investments, encouraging employers (and workers) to do more of it.

- *Measuring and communicating the returns from investing in lower-skilled workers* is critical to encouraging employers to invest more. Many employers are simply not aware of the positive impact that training can make to their bottom line. WISF should help them see this impact.

3. Filling the remaining training gaps

There may be some important types of training that employers may never have a strong incentive to provide. Employers will rarely have an incentive to invest in skills that are highly portable (i.e., skills that are equally valuable at any employer, in any job) and those that employers do not find lacking in their current applicant pool. Basic, remedial and language skills may fit this profile.

While a few employers provide basic skills training in order to reduce errors and because these skills are critical to the job, most claim that current employees have adequate basic skills. Consequently, one survey found that less than 10% of firms provide basic skill training.[13] "Give us applicants with a good work ethic and a good basic education, and we will provide the specialized training," was the view expressed by many employer participants in recent small business forums held by the California Workforce Investment Board.

But basic skills are critical. Workers prospects for employment and advancement are severely limited without basic reading, math, and language skills. Where employer incentives cannot be created, public institutions have the obligation to provide this type of training directly or by fully subsidizing employers to do so. The current VESL Immersion Program (VIP) operated by DHS, the Private Industry Council, Catholic Charities, Arriba Juntos, and City College of San Francisco is one successful model currently filling this important need.

4. Increasing employer utilization of public training resources

Policy should also improve the utilization of existing public training resources by employers. Public training resources often come at no or low (subsidized) cost to employers, yet remain the least preferred option for employers seeking outside training help. Consequently, public training programs may be failing to meet employer needs or may be redundant with training already provided by employers. To alleviate this problem, WISF should

- *Make public training programs accessible and known to employers.* Accessibility requires a mechanism through which employers can easily navigate the public training system, and a training system that is receptive to their inquiry. WISF's Employer Solutions Map is a first step towards accomplishing both of these goals, but WISF programs should continue to become more employer-facing.

- *Determine and communicate the value of public training programs.* Employers that use public training programs have seen tangible benefits. For instance, Isbell, Trutko, and Barnow (2000) found that companies who developed customized training programs under the Job Training Partnership Act indicated that the returns on their investment far outweighed the costs through improved customer service, morale, and lower turnover. Locally, San Francisco Works (2002) found that "employers across a range of industries can benefit economically from participation in workforce development partnerships." However, employers' lack of awareness of these economic benefits may hamper their pursuit of such partnerships. WISF and its members should seek to quantify and communicate the economic benefits to employers of partnering with public programs.

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[1] Lerman, McKernan, and Reigg (1999) provide the most comprehensive synthesis of the major surveys of employer-provided training in the United States. The estimates and ranges I cite are theirs, and take into account the methodological differences between these surveys.

[2] From Van Buren and Erskine (2002)

[3] According to the County Business Patterns program of the U.S. Census Bureau, San Francisco had 31,406 establishments with 555,547 employees and an annual payroll of $31 billion in 2000.

[4] See Frazis, Herz, and Horrigan (1998)

[5] According to data obtained from the U.S. Bureau of Labor Statistics and the Labor Market Information Division of California's Employment Development Department, San Francisco has a relatively higher concentration of management, professional, and clerical occupations than the US overall, and few production-related jobs. Mirroring this specialization, San Francisco also has a much higher concentration of FIRE and Services (especially Business Services), and less Construction and Manufacturing, than the US overall.

[6] In their Summer 2002 "Bay Area Business Confidence Survey," the Bay Area Economic Council found that 28% of Bay Area employers have decreased training expenditure, 44% have maintained it, and 18% have increased it. This publication in available at *www.bayareacouncil.org.*

[7] While this analysis utilizes data from the BLS 1995 Survey of Employer Provided Training, which focused on employers with 50 or more employees, the general findings are supported by most other surveys of employers and employees regarding employer-supported training.

[8] This section draws heavily on the work of Ahlstrand, Bassi, and McMurrer (2003) in their forthcoming book, *Workplace Education for Lower-Wage Workers.* Their research is the most comprehensive work specifically examining employer-provided training for low-wage workers. The identification of barriers and policy solutions, in particular, draws on their work.

[9] For instance, see Ahlstrand, Bassi, and McMurrer (2003)

[10] See Bloom and Lafleur (1999) and Bassi, Harrison, Ludwig, and McMurrer (2001)

[11] See Workforce Investment San Francisco (2002).

[12] See Ahlstrand, Armbruster, Bassi, McMurrer, and Van Buren (2000)

[13] See Frazis, Gittleman, Horrigan, and Joyce (1998).

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** NOVEMBER 13, 2002

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: EXECUTIVE COMMITTEE RECOMMENDATIONS: PROPOSED BY-LAW AMENDMENTS (AGENDA ITEM 6A)

The WISF Board is asked to consider the Executive Committee's recommendations for adoption. The Executive Committee met today, solicited public testimony, and reviewed and approved the Bylaw amendments.

BACKGROUND

WISF Board Bylaws provide that "the Bylaws may be amended at any meeting of the Members at which a quorum is present by an affirmative vote of a majority of the Members, provided that notice of the intended action is explicit and is included with the materials for the meeting received at least *thirty (30)* days in advance of the meeting".

- July 31, 2002 and August 7, 2002, the WISF Board held their first Strategic Planning Retreat and developed a draft "practical vision".
- August 30, 2002, a memorandum was sent to WISF Board Members, announcing timeline for By-law amendments.
- September 9, 2002 was the deadline for submission of amendments for September 18th WISF Board Meeting.
- September 18, 2002, the WISF Board held a brief discussion at its meeting.
- September 9, 2002, the PIC Senior Leadership Team held a retreat to discuss WISF Board Retreat results.
- September 24, 2002, a reminder for submission of Bylaw amendments was sent to WISF Board Members via email and/or fax.
- October 1, 2002 was the deadline for submission of all proposed Bylaw amendments for November 20th WISF Board Meeting.
- October 22, 2002, WISF Board members received proposed By-Law amendments via email, fax, and US postal mail.
- November 13, 2002, the Executive Committee will hold a discussion and forward recommendations to the WISF Board.
- November 20, 2002, the WISF Board will hold a discussion to adopt By-law amendments.

Attachment

Current Bylaws	Executive Committee Amendments
3.8 Removal from membership Reasons for removal may include failure to attend at least half of the regularly scheduled meetings of the LWIB during a twelve-month year (February 1 – January 31), or a failure to attend three (3) consecutive meetings without prior notification *to the Chairperson or Secretary* of inability to attend.	Reasons for removal may include failure to attend at least half of the regularly scheduled meetings of the LWIB during a twelve-month year (February 1 – January 31), or a failure to attend three (3) consecutive meetings ~~without prior notification *to the Chairperson or Secretary* of inability to attend~~.
5.0 Committees of the Certified Local Workforce Investment Board • Employer Services Committee • Executive Committee • One Stop Committee • Program Resources Committee • Research and Evaluation Committee • Youth Council	Modify current Committees to five standing committees with appropriate subcommittees • **Executive Committee** (expand mandate to include Finance Subcommittee) ***Finance Subcommittee*** shall be responsible for the review and advice to the Executive Committee and the LWIB of the (1) monitor and review WIB budgets and expenditures; (2) prepare recommendations for WIA and other funding streams within workforce development system; and (3) review audit and other financial reports from PIC, Inc. as agent of WIB/Mayor partnership. Finance Subcommittee shall consist of a majority of Executive Committee Members, One Stop Committee Member, and a current WISF Board Member and does not exceed five members.
5.7 One Stop Operation This committee shall monitor operations of OSSF and prepare recommendations to LWIB and the Executive Committee concerning the allocation of scarce resources to and between: operation of facilities (centers and satellite locations) and operation of systems (technology, personnel staffing and training); and operation of job-seeker training (cost reimbursement contracts and/or individual referral contracts). This committee shall be	• **One Stop Operations and Services** (name of Committee is changed and mandate is modified to exclude budget "allocation of scarce resources to and between: operation of… , operation of systems…and operation of job-seeker training"). This committee shall monitor operations of OSSF ~~and prepare recommendations to LWIB and the Executive Committee concerning the allocation of scarce resources to and between:~~ and operation of facilities (centers and satellite locations)

Current Bylaws	**Executive Committee Amendments**
responsible for recommendation of Memoranda of Understanding with One-Stop Partners as required by the Act. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL) and for development of marketing strategies for OSSF.	and operation of systems (technology, personnel staffing and training); ~~and operation of job-seeker training (cost reimbursement contracts and/or individual referral contracts)~~. This committee shall be responsible for recommendation of Memoranda of Understanding with One-Stop Partners and designation of One Stop Operator as required by the Act. This committee shall also prepare recommendations for ~~local criteria for the Eligible Training Provider List (ETPL) and for~~ development of marketing strategies for OSSF. • **Program Resources Committee** (expand duties to include preparing recommendations for local criteria for the Eligible Training Provider List (ETPL) and expand mandate to include Research and Evaluation) • **Employer Service Committee** (mandate stays the same) • **Youth Council** (mandate stays the same)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** NOVEMBER 13, 2002

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (AGENDA ITEM 6B)

The Executive Committee met today, solicited public testimony, and reviewed and approved staff's recommendations. I am forwarding the Executive Committee's recommendations to you for your approval.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco (WISF) Board, ratified the Youth Council's action and on December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002 the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001 without a due date.

DISCUSSION

RFQ is a process to identify and competitively select providers of specified services for individual referral at a quoted price. The use of an individual referral approach for securing youth services allows Youth Opportunity. San Francisco (YO! SF) staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process described above asked organizations to submit Statements of Qualifications. Each statement is reviewed, and if competitive and eligible to receive federal funds and provide the service(s) described, is recommended for placement on a vendors list.

Since June 27, 2002, additional potential vendors have submitted Statements of Qualifications.

RECOMMENDATION

The staff have review all Statements of Qualifications submitted to the PIC since August 29, 2002, has determined the vendors to be eligible to receive WIA Title ID Funds and the Executive Committee recommends the vendors listed on Table I be added to the youth vendors list.

Attachment

PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
TITLE 1D YOUTH OPPORTUNITY GRANT (YOG)
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
155	**Time Out Anger Management** 4918 3rd Street 822-9144	Violence Prevention program for 601/602 offender between 14 and 21. A combination of job readiness and life skills activities that which uses the Health Realization Model and the SERA Learning Concept. Working and consulting with **Before The After**, a pioneer in using this model with domestic violence programs.	$1,800	**YES**
156	**United Project, Inc.** 141 Steiner Street 626-5525	Occupational Classroom Training for **Basic Sound Recording**	$6,775	**YES**
157	**United Project, Inc. 141 Steiner Street 626-5525**	Occupational Classroom Training /**Introductory Theatre Technician Course**	$6,775	**YES**
158	**United Project, Inc.** 141 Steiner Street 626-5525	Occupational Classroom Training/**MIDI Recording Course**	$6,775	**YES**
159	**Brava! For Women in the Arts** 2781 24th Street 641-7657	**OFF-SITE SERVICES** - Occupational training for youth 14-21 for entry-level jobs in technical arts. Twelve-week, 100-hour program taught by theater professionals. Occupational titles include sound and lighting technicians, stage managers, designers, box office and house management personnel, security, publicity and administration. After completion of training, each graduate receives a stipend and is placed in a six-week apprenticeship at a local theater, arts organization or production company. Placement in a technical arts job paying $8-15/hr. 12-month follow-up services.	$6,055	**YES**

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES OF THE NOVEMBER 20, 2002 MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held in the Forum of the Yerba Buena Center for the Arts located at 701 Mission Street, San Francisco, CA.

PRESENT:
Lynn Bunim, Chair; William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay

ABSENT:
Irene Agnos, Shelley Bradford-Bell, Anni Chung, Kimberly Cousin, Philip Day, Mary Edington, Theresa Feeley, Gregg Fortner, Sally Gallegos, Sandra Hernandez, Dwayne Jones, Nate Mason, Kes Narbutas, Craig Newmark, Marion Standish, Erika Thorson-Garay, Stan Warren, and Dan Whooley

STAFF:
Alice Chiu, Cathy de Cristofaro, Wes Dixon, Karen Hart, Raymond Holland, Lucia Hughes, Jim Kennedy, Zenaida Paguirigan, Robert Schwab, Judith Villamor

PUBLIC:
Herb Anderson, Lorraine Giordano, Karl Jaensch, Henry Lau, Ralph Lee, Mark Mak, Missy Raglin, Frances Rath, Nancy Rynd, Dina Santana, Gerry Souzis, Kevin Stange

Chair Bunim convened the meeting at 9:35 A.M. A quorum was established at 10:05 A.M.

Ms. Bunim welcomed all Members and thanked staff for their hard work in supporting the Board and its committees. She also thanked the chairs of the committees for their hard work and leadership. She also thanked John Killacky for the usage of the Yerba Buena Center for the Arts facility.

Ms. Bunim announced that there are two Members who have resigned from the Board – Shelley Bradford-Bell and Irene Agnos. She thanked them for their service on the Board.

Ms. Bunim welcomed Lorraine Giordano the new Director of the San Francisco Information Technology Consortium, and Ralph Lee, a Ramada representative, who is a prospective member.

Item 4 – Presentations

WISF Board's Goals and Accomplishments

Pamela Calloway gave a brief overview of the Board's progress in the year. Ms. Calloway discussed the three evaluative tools for the Board: eight functions of the Board, Board's practical vision, and the action steps from the Employer's Forum. Each committee was measured against the eight major function, practical vision, and action steps from the Employer's Forum.

Ms. Calloway reminded the Board of the eight functions of the Board: (1) Define the size and shape of the local workforce development system and its role within the system; (2) Set overall direction for local workforce development system; (3) Establish or approve operational structures and make operational policies for the local workforce development system as a whole; (4) Oversee the performance of the system; (5) Has role in external relations, public relations and marketing for the workforce development system; (6) Encourage new ideas to advance the state of the art; (7) Work to augment the system's available resources; and (8) Serve as "honest broker" among the various parts of the workforce development system.

At the Board's retreat, eight visions were developed: (1) Organize alignment to meet goals; (2) Develop a labor supply strategy; (3) Create a One Stop that works; (4) Track, measure, and analyze outcomes; (5) Develop marketing plan(s) with measurable outcomes; (6) Complete job Initiatives; (7) Build unified advocacy capacity and success; and (8) Leverage strategic alliances and resources.

Four action steps developed from the Employer's Forum: (1) Form a taskforce to maximize the benefits of the Solutions Map and to use the Map to increase awareness of workforce needs; (2) Invite private sectors representatives to be involved with the Board; (3) Coordinate brown bag activities at San Francisco Chamber of Commerce and other employer organizations to focus on a special population that employers should look to hire; and (4) Form a group to identify small business skill sets in hiring and selection.

Ms. Calloway discussed the next steps of the Board. She informed the Board that she and the Chair would be meeting with the Mayor early next year to discuss the accomplishments of the Board and his vision for the work of the Board. In February, the Board would be reappointed and there would be new committee assignments. Board would adopt new goals for the year and those goals would be assigned to the appropriate committees for implementation. Quarterly reports would be provided to the Board.

Research Update on WIA

Kevin Stange briefly presented an overview of the WISF research plan for the 2002 – 2003 program year and a research brief on employer-provided training. The mission statement of the plan is to "ensure that members of the San Francisco's workforce development community are provided with the economic and labor market information and research needed to make informed decisions". The goals for the program year 02-03 is to (1) develop a shared knowledge base about San Francisco's workforce development system and needs; (2) build more efficient and effective linkages between labor supply and demand; and (3) promote and enable information-driven workforce development planning and decision-making.

The research plan was an effort to address the many questions of the San Francisco workforce development community. The answers to those question fall into four broad categories: resource mapping, workforce development needs, outcome assessment, and career paths. Each of the categories had tangible and specific projects assigned to them.

In the resource-mapping category, there were six projects: a research brief on each of the five major workforce development components (community organizations, employers, unions, community colleges, and proprietary schools). In the workforce development needs category, there were four projects: a research project describing the city's economic and occupational base through analysis and synthesis of labor market data; an industry cluster analysis to identify local economic growth areas; a research report describing qualitative kills; and a quarterly newsletter synthesizing up-to-date local labor market information. In the outcome assessment category, there is one project: to develop a comprehensive assessment of client outcomes in San Francisco's workforce development system. In the career path category, there is one project: to report which identifies and profiles career paths for low-income workers in San Francisco.

In the research brief, Mr. Stange provided a quick overview of employer-provider training in San Francisco. The brief first summarized several "facts" about employer-provided training, then highlighted two main concerns these facts raised for WISF, and concluded by identifying several policy responses for San Francisco.

The "facts" were:

- At 2% of payroll, San Francisco employers directly spent about $620 million training their employees in 2000, providing formal training to about half of all workers and informal training to nearly all
- High-level job skills training (managerial, computer, professional/technical) and basic company orientation and safety training are the most common. Employers rarely provide basic or remedial skills training
- Employer-provided training disproportionately target higher-skilled, better educated, higher-paid individuals
- Larger firms in skill intensive industries are the most likely to provide training, particularly those with generous benefits packages and low turnover
- Training is overwhelmingly delivered by in-house staff, with for-profit firms and contractors being the preferred outside training vendors

The two policy concerns for the Board are (A) Employers do not typically provide career advancement training for lower-skilled workers; and (B) Public training resources are infrequently used by employers.

There are four WISF policy responses for San Francisco:
(1) Direct support for lower-skilled incumbent worker training
(2) Encourage more employer investment
(3) Fill training "gaps" where employer incentives are ineffective (e.g. basic, remedial, and language skills)
(4) Make public training programs more accessible and known to employers and determine and communicate their value

Chair Bunim asked that there be accessible section on the website (www.picsf.org) for the research briefs and update.

Darlene Rutkowski wanted to know why in the career path category, the targeted population is low-income and not more inclusive. Mr. Stange replied that currently the low-income population is targeted but he added that project is open for shaping and molding.

Nathan Nayman asked how the data in the presentation is compared to other large cities in the United States and if the data is from a mix of small, medium, and large employers. Mr. Stange replied that the data is national and extracted from employers of all sizes.

Motion to adopt the agenda was made by Aileen Hernandez and seconded by Nicholas de Lorenzo.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**

Nays: None
Abstentions: None
Motion passed.

Motion to adopt the minutes of the meeting held on September 18, 2002 was made by Victor Revenko and seconded by Ave Seltsam.

Ayes: William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Item 5 – Committee Reports

Employer Services Committee

Nathan Nayman reported on the recent meeting of the Committee. At the last meeting, the Committee reviewed and discussed some of the issues and ideas from the Employers Forum. Staff had presented recommendations for the next event. The Committee also reviewed the Board's strategic plan and suggested that the committees have an opportunity to be involved in the budget process. The Committee also discussed a rapid turnaround set aside for customized training. There was consensus amongst the Committee that this type of training would better engage the business community. Mr. Nayman informed the Board that the Committee would be discussing the issue in upcoming meetings. He also reported that the Committee intends to meet with the One Stop Committee to discuss ways to make the One Stop as relevant to employers.

Chair Bunim encouraged Board Members and the public to be involved in the Committee's discussion(s) on the customized training issue.

One Stop Committee

Rosalie Bulach reported that the Committee had also discussed future partnership with the Employer Services Committee. She informed the Board that the Employer Services Committee and the One Stop Committee would be meeting together in January. Ms. Bulach also reported that presentations from various Partners have been made to the Committee. She added that the presentations were helpful to see the bigger picture of the various workforce opportunities in San Francisco.

Program Resources Committee

Trent Rhorer reported that the Program Resources Committee would be meeting in December. Mr. Rhorer expressed his support of the Program Resources Committee merging with the Research and Evaluation Committee (on the agenda to be approved at this meeting).

Youth Council

Ann Cochrane reported that the Youth Council has held discussions on the strategic planning of the Council. She commented that the Council has made efforts to leverage resources and involve the community in discussions.

Chair Bunim applauded the committees for all its hard work and encouraged the partnerships between the committees.

Before proceeding, Chair Bunim asked the Members to sign the Conflict of Interest Declarations.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Item 6 – Executive Committee Recommendations

Bylaw Amendments

Pamela Calloway briefly presented Executive Committee recommendations for amendments to the current WISF Bylaws. Ms. Calloway explained that the amendments were made in attempt to address three issues: obtaining quorum, fiscal management and oversight, and streamline the WISF Board work. The Executive Committee recommended the following:

3.8 Removal of Membership

To delete "without prior notification to the Chairperson or Secretary of inability to attend" in order to read, "Reasons for removal may include failure to attend at least half of the regularly scheduled meetings of the LWIB during a twelve-month year (February 1 – January 31), or a failure to attend three (3) consecutive meetings".

5.0 Committees of the Certified Local Workforce Investment Board

To expand the mandate of the Executive Committee to include a finance subcommittee. The finance subcommittee shall monitor and review budgets and expenditures; prepare recommendations for WIA and other funding streams within workforce development system; and review audit and other financial reports from PIC, Inc. as agent of the WIB/Mayor partnership. Members of the subcommittee shall consist of a majority of the Executive Committee, a One Stop Committee Member, and a current Board Member. The subcommittee shall not exceed five members.

To changed the name of the One Stop Committee to "One Stop Operations and Services Committee". To modify mandate to exclude budget "allocation of scarce resources to and between operation of facilities, systems, and job-seeker training.

To expand the mandate of the Program Resources Committee to include the mandate of Research and Evaluation Committee and duties to include preparing recommendations for local criteria for the Eligible Training Providers List.

Motion to ratify the recommendations was made by Ann Cochrane and seconded by Leslie Luttgens.

Ayes:	**William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**
Nays:	**None**
Abstentions:	**None**

Motion passed.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Additions to Supplemental Vendor List

Ann Cochrane briefly presented the Executive Committee recommendations for the WIA Title ID vendor list. The Committee recommended the following vendors be added to the list: Time Out Anger Management, United Projects, Inc., and Brava! For Women in the Arts.

Motion to ratify the recommendations was made by Leslie Luttgens and seconded by Craig Martin.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**

Nays: **None**

Abstentions: **None**

Motion passed.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Other Business

Abby Snay informed and encouraged the Board to attend the upcoming conference of the Workforce Alliance.

Craig Martin reported on his trip to a meeting of the National Association of Workforce Boards. He stated that the Secretary of Labor assumes that there are not any success stories from One Stop Centers. He suggested that San Francisco submit its One Stop success stories.

Scott Hauge reported on a Bay Area Works meeting, which he co-chairs. Bay Area Works discussed ways to collaborate between employers, WIBs, education, etc. They also looked at regional solutions to provide resources to the local WIBs.

Public Testimony on Non-Agenda Items

San Francisco Sheriff's Department

Dina Santana asked what is the position of the Board on the increasing unemployment rate of ex-offenders. Pamela Calloway replied that the Board is aware of the need to address this issue and informed Ms. Santana that Northern California Service League (NCSL) is one subcontractor that deals with that specific population. She directed Ms. Santana to speak with one of the PIC Operation staff for more details. Ms. Santana replied that she is aware of the existence of NCSL but added that that is not enough.

Chair Bunim asked that the Program Resources Committee and staff take this issue under advice.

Motion to adjourn meeting was made by Aileen Hernandez and seconded by Leslie Luttgens.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba,**

	Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay
Nays:	**None**
Abstentions:	**None**

Motion passed.

The Meeting was adjourned at 11:16 A.M.

The Honorable Mayor Willie L. Brown, Jr.
will administer the Oath of Office to the
Workforce Investment San Francisco Board

On

Wednesday, February 19, 2003
City Hall Room 201
1 Dr. B Goodlett Place, San Francisco
9:30 a.m.

Please join Lynn Bunim and Pamela Calloway
for refreshments at 9:00 a.m.
The oath will be administered promptly at 9:30 a.m.

RSVP by Monday, February 17, 2003
to Alice Chiu at (415) 923-4464 /achiu@picsf.org.

Please remember that you must turn off all cellular phones and other paging devices during the ceremony.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, February 19, 2003
Time: 9:30 a.m. – 11:30 a.m.
Location: San Francisco City Hall – Room 201
1 Dr Carlton B Goodlett Place
San Francisco, CA 94102

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, February 12, 2003

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, FEBRUARY 19, 2003

9:30 A.M. OATH OF OFFICE ADMINISTERED BY MAYOR WILLIE L. BROWN, JR. TO WISF BOARD MEMBERS

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the November 20, 2002 meeting *(Action Item)**
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentation*
    A. "San Francisco Economy and Labor Market" by Kevin Stange, WISF Board Research Analyst and John Crapo, Director of Economic Development and Research, San Francisco Center for Economic Development – San Francisco Chamber of Commerce
5. Committee Reports (Information Items)
    A. Employer Services Committee
    B. One Stop Operation and Services Committee
    C. Program Resources Committee
    D. Youth Council
6. President's Report (Discussion Item)
    A. Business Leadership; Business Results
    - Corliss Fong, Director, Human Resources, Macy's West
    B. Leading the One Stop System: Building Integrated Service Delivery & Building Employer Relationships: Making Business Satisfied, Life-long Partners and Customers – presenter TBD
    C. American Assembly's Achieving Workers Success and Business Prosperity: The Role of the Workforce Intermediaries – Teresa Feeley, Executive Director, San Francisco Works
7. Chair's Report (Discussion Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Adjournment *(Action Item)*

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES OF THE
NOVEMBER 20, 2002 MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held in the Forum of the Yerba Buena Center for the Arts located at 701 Mission Street, San Francisco, CA.

PRESENT:
Lynn Bunim, Chair; William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay

ABSENT:
Irene Agnos, Shelley Bradford-Bell, Anni Chung, Kimberly Cousin, Philip Day, Mary Edington, Theresa Feeley, Gregg Fortner, Sally Gallegos, Sandra Hernandez, Dwayne Jones, Nate Mason, Kes Narbutas, Craig Newmark, Marion Standish, Erika Thorson-Garay, Stan Warren, and Dan Whooley

STAFF:
Alice Chiu, Cathy de Cristofaro, Wes Dixon, Karen Hart, Raymond Holland, Lucia Hughes, Jim Kennedy, Zenaida Paguirigan, Robert Schwab, Judith Villamor

PUBLIC:
Herb Anderson, Lorraine Giordano, Karl Jaensch, Henry Lau, Ralph Lee, Mark Mak, Missy Raglin, Frances Rath, Nancy Rynd, Dina Santana, Gerry Souzis, Kevin Stange

Chair Bunim convened the meeting at 9:35 A.M. A quorum was established at 10:05 A.M.

Ms. Bunim welcomed all Members and thanked staff for their hard work in supporting the Board and its committees. She also thanked the chairs of the committees for their hard work and leadership. She also thanked John Killacky for the usage of the Yerba Buena Center for the Arts facility.

Ms. Bunim announced that there are two Members who have resigned from the Board – Shelley Bradford-Bell and Irene Agnos. She thanked them for their service on the Board.

Ms. Bunim welcomed Lorraine Giordano the new Director of the San Francisco Information Technology Consortium, and Ralph Lee, a Ramada representative, who is a prospective member.

Item 4 – Presentations

WISF Board's Goals and Accomplishments

Pamela Calloway gave a brief overview of the Board's progress in the year. Ms. Calloway discussed the three evaluative tools for the Board: eight functions of the Board, Board's practical vision, and the action steps from the Employer's Forum. Each committee was measured against the eight major function, practical vision, and action steps from the Employer's Forum.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2400
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800 735.2929 (CRS)

Ms. Calloway reminded the Board of the eight functions of the Board: (1) Define the size and shape of the local workforce development system and its role within the system; (2) Set overall direction for local workforce development system; (3) Establish or approve operational structures and make operational policies for the local workforce development system as a whole; (4) Oversee the performance of the system; (5) Has role in external relations, public relations and marketing for the workforce development system; (6) Encourage new ideas to advance the state of the art; (7) Work to augment the system's available resources; and (8) Serve as "honest broker" among the various parts of the workforce development system.

At the Board's retreat, eight visions were developed: (1) Organize alignment to meet goals; (2) Develop a labor supply strategy; (3) Create a One Stop that works; (4) Track, measure, and analyze outcomes; (5) Develop marketing plan(s) with measurable outcomes; (6) Complete job Initiatives; (7) Build unified advocacy capacity and success; and (8) Leverage strategic alliances and resources.

Four action steps developed from the Employer's Forum: (1) Form a taskforce to maximize the benefits of the Solutions Map and to use the Map to increase awareness of workforce needs; (2) Invite private sectors representatives to be involved with the Board; (3) Coordinate brown bag activities at San Francisco Chamber of Commerce and other employer organizations to focus on a special population that employers should look to hire; and (4) Form a group to identify small business skill sets in hiring and selection.

Ms. Calloway discussed the next steps of the Board. She informed the Board that she and the Chair would be meeting with the Mayor early next year to discuss the accomplishments of the Board and his vision for the work of the Board. In February, the Board would be reappointed and there would be new committee assignments. Board would adopt new goals for the year and those goals would be assigned to the appropriate committees for implementation. Quarterly reports would be provided to the Board.

Research Update on WIA

Kevin Stange briefly presented an overview of the WISF research plan for the 2002 – 2003 program year and a research brief on employer-provided training. The mission statement of the plan is to "ensure that members of the San Francisco's workforce development community are provided with the economic and labor market information and research needed to make informed decisions". The goals for the program year 02-03 is to (1) develop a shared knowledge base about San Francisco's workforce development system and needs; (2) build more efficient and effective linkages between labor supply and demand; and (3) promote and enable information-driven workforce development planning and decision-making.

The research plan was an effort to address the many questions of the San Francisco workforce development community. The answers to those question fall into four broad categories: resource mapping, workforce development needs, outcome assessment, and career paths. Each of the categories had tangible and specific projects assigned to them.

In the resource-mapping category, there were six projects: a research brief on each of the five major workforce development components (community organizations, employers, unions, community colleges, and proprietary schools). In the workforce development needs category, there were four projects: a research project describing the city's economic and occupational base through analysis and synthesis of labor market data; an industry cluster analysis to identify local economic growth areas; a research report describing qualitative kills; and a quarterly newsletter synthesizing up-to-date local labor market information. In the outcome assessment category, there is one project: to develop a comprehensive assessment of client outcomes in San Francisco's workforce development system. In the career path category, there is one project: to report which identifies and profiles career paths for low-income workers in San Francisco.

In the research brief, Mr. Stange provided a quick overview of employer-provider training in San Francisco. The brief first summarized several "facts" about employer-provided training, then highlighted two main concerns these facts raised for WISF, and concluded by identifying several policy responses for San Francisco.

The "facts" were:

- At 2% of payroll, San Francisco employers directly spent about $620 million training their employees in 2000, providing formal training to about half of all workers and informal training to nearly all
- High-level job skills training (managerial, computer, professional/technical) and basic company orientation and safety training are the most common. Employers rarely provide basic or remedial skills training
- Employer-provided training disproportionately target higher-skilled, better educated, higher-paid individuals
- Larger firms in skill intensive industries are the most likely to provide training, particularly those with generous benefits packages and low turnover
- Training is overwhelmingly delivered by in-house staff, with for-profit firms and contractors being the preferred outside training vendors

The two policy concerns for the Board are (A) Employers do not typically provide career advancement training for lower-skilled workers; and (B) Public training resources are infrequently used by employers.

There are four WISF policy responses for San Francisco:
(1) Direct support for lower-skilled incumbent worker training
(2) Encourage more employer investment
(3) Fill training "gaps" where employer incentives are ineffective (e.g. basic, remedial, and language skills)
(4) Make public training programs more accessible and known to employers and determine and communicate their value

Chair Bunim asked that there be accessible section on the website (www.picsf.org) for the research briefs and update.

Darlene Rutkowski wanted to know why in the career path category, the targeted population is low-income and not more inclusive. Mr. Stange replied that currently the low-income population is targeted but he added that project is open for shaping and molding.

Nathan Nayman asked how the data in the presentation is compared to other large cities in the United States and if the data is from a mix of small, medium, and large employers. Mr. Stange replied that the data is national and extracted from employers of all sizes.

Motion to adopt the agenda was made by Aileen Hernandez and seconded by Nicholas de Lorenzo.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**

Nays: None
Abstentions: None
Motion passed.

Motion to adopt the minutes of the meeting held on September 18, 2002 was made by Victor Revenko and seconded by Ave Seltsam.

Ayes: William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Item 5 – Committee Reports

Employer Services Committee

Nathan Nayman reported on the recent meeting of the Committee. At the last meeting, the Committee reviewed and discussed some of the issues and ideas from the Employers Forum. Staff had presented recommendations for the next event. The Committee also reviewed the Board's strategic plan and suggested that the committees have an opportunity to be involved in the budget process. The Committee also discussed a rapid turnaround set aside for customized training. There was consensus amongst the Committee that this type of training would better engage the business community. Mr. Nayman informed the Board that the Committee would be discussing the issue in upcoming meetings. He also reported that the Committee intends to meet with the One Stop Committee to discuss ways to make the One Stop as relevant to employers.

Chair Bunim encouraged Board Members and the public to be involved in the Committee's discussion(s) on the customized training issue.

One Stop Committee

Rosalie Bulach reported that the Committee had also discussed future partnership with the Employer Services Committee. She informed the Board that the Employer Services Committee and the One Stop Committee would be meeting together in January. Ms. Bulach also reported that presentations from various Partners have been made to the Committee. She added that the presentations were helpful to see the bigger picture of the various workforce opportunities in San Francisco.

Program Resources Committee

Trent Rhorer reported that the Program Resources Committee would be meeting in December. Mr. Rhorer expressed his support of the Program Resources Committee merging with the Research and Evaluation Committee (on the agenda to be approved at this meeting).

Youth Council

Ann Cochrane reported that the Youth Council has held discussions on the strategic planning of the Council. She commented that the Council has made efforts to leverage resources and involve the community in discussions.

Chair Bunim applauded the committees for all its hard work and encouraged the partnerships between the committees.

Before proceeding, Chair Bunim asked the Members to sign the Conflict of Interest Declarations.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Item 6 – Executive Committee Recommendations

Bylaw Amendments

Pamela Calloway briefly presented Executive Committee recommendations for amendments to the current WISF Bylaws. Ms. Calloway explained that the amendments were made in attempt to address three issues: obtaining quorum, fiscal management and oversight, and streamline the WISF Board work. The Executive Committee recommended the following:

3.8 Removal of Membership

To delete "without prior notification to the Chairperson or Secretary of inability to attend" in order to read, "Reasons for removal may include failure to attend at least half of the regularly scheduled meetings of the LWIB during a twelve-month year (February 1 – January 31), or a failure to attend three (3) consecutive meetings".

5.0 Committees of the Certified Local Workforce Investment Board

To expand the mandate of the Executive Committee to include a finance subcommittee. The finance subcommittee shall monitor and review budgets and expenditures; prepare recommendations for WIA and other funding streams within workforce development system; and review audit and other financial reports from PIC, Inc. as agent of the WIB/Mayor partnership. Members of the subcommittee shall consist of a majority of the Executive Committee, a One Stop Committee Member, and a current Board Member. The subcommittee shall not exceed five members.

To changed the name of the One Stop Committee to "One Stop Operations and Services Committee". To modify mandate to exclude budget "allocation of scarce resources to and between operation of facilities, systems, and job-seeker training.

To expand the mandate of the Program Resources Committee to include the mandate of Research and Evaluation Committee and duties to include preparing recommendations for local criteria for the Eligible Training Providers List.

Motion to ratify the recommendations was made by Ann Cochrane and seconded by Leslie Luttgens.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**

Nays: **None**

Abstentions: **None**

Motion passed.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Additions to Supplemental Vendor List

Ann Cochrane briefly presented the Executive Committee recommendations for the WIA Title ID vendor list. The Committee recommended the following vendors be added to the list: Time Out Anger Management, United Projects, Inc., and Brava! For Women in the Arts.

Motion to ratify the recommendations was made by Leslie Luttgens and seconded by Craig Martin.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay**

Nays: **None**

Abstentions: None

Motion passed.

Chair Bunim asked if there was public testimony on the agenda item. There was none.

Other Business

Abby Snay informed and encouraged the Board to attend the upcoming conference of the Workforce Alliance.

Craig Martin reported on his trip to a meeting of the National Association of Workforce Boards. He stated that the Secretary of Labor assumes that there are not any success stories from One Stop Centers. He suggested that San Francisco submit its One Stop success stories.

Scott Hauge reported on a Bay Area Works meeting, which he co-chairs. Bay Area Works discussed ways to collaborate between employers, WIBs, education, etc. They also looked at regional solutions to provide resources to the local WIBs.

Public Testimony on Non-Agenda Items

San Francisco Sheriff's Department

Dina Santana asked what is the position of the Board on the increasing unemployment rate of ex-offenders. Pamela Calloway replied that the Board is aware of the need to address this issue and informed Ms. Santana that Northern California Service League (NCSL) is one subcontractor that deals with that specific population. She directed Ms. Santana to speak with one of the PIC Operation staff for more details. Ms. Santana replied that she is aware of the existence of NCSL but added that that is not enough.

Chair Bunim asked that the Program Resources Committee and staff take this issue under advice.

Motion to adjourn meeting was made by Aileen Hernandez and seconded by Leslie Luttgens.

Ayes: **William Allen, Michael Blecker, Rosalie Bulach, Pamela Calloway, Kathye Citron, Ann Cochrane, Nicholas deLorenzo, Corliss Fong, Scott Hauge, Aileen Hernandez, Phyllis Jackson, John Killacky, Curt Kirschner, Leslie Luttgens, Craig Martin, Brian Murphy, Nathan Nayman, John Poremba,**

Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Ave Seltsam, Dana Serleth, and Abby Snay

Nays: **None**

Abstentions: **None**

Motion passed.

The Meeting was adjourned at 11:16 A.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** February 12, 2003

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: LABOR MARKET AND ECONOMIC RESEARCH (Agenda Item 4A)

It is my pleasure to bring to you two pieces of research that we will be discussing at your upcoming meeting. The first, *Ten Things to Know About San Francisco's Economy and Employers,* provides a basic orientation to San Francisco's economy and employer base. This report aims to bring all of us to a common understanding of the basic structure of San Francisco's economy. The second is a brief quarterly update on the state of San Francisco's local labor market, including the unemployment and job picture. Workforce Investment San Francisco will be collaborating with the San Francisco Center for Economic Development to produce this report quarterly, as part of our ongoing effort to create linkages between workforce needs (demand) and our training strategy (supply).

John Crapo of the San Francisco Center for Economic Development and Kevin Stange, our research analyst, will be teaming up at your next meeting to present this research and initiate a discussion about its implications. As you read the enclosed materials, please consider the following questions:

1. Should our training strategy shift given recent changes in San Francisco's economy (e.g. exceptional job losses in certain sectors)? How?
2. How can our investment in human capital have the greatest economic impact?
3. Given the regional nature of San Francisco's labor market, are we addressing the regional workforce needs of San Francisco's employers? How can we improve this?
4. How can our workforce development system adequately serve the needs of all San Francisco employers, regardless of their size or industry (because from an employment perspective, all are important)
5. What implications do recent economic changes have for our clients who are most in need?
6. Do elements of San Francisco's labor market structure prevent adequate career paths from forming between low and high wage occupations? If so, what can be done?
7. Is this type of economic and labor market information valuable? Should we continue to devote resources to it?

I look forward to an engaging discussion about where San Francisco's economy is headed and, importantly, what role our workforce development system can play in this progression.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

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Research Brief: *Ten Things to Know About San Francisco's Economy and Employers*

A Publication to Inform
San Francisco's Workforce and Economic Development Community
February 2003

Executive Summary

This Research Brief was developed to provide members of San Francisco's business, workforce and economic development communities – and other interested members of the public – with a basic orientation to the size, structure, and historical evolution of San Francisco's economy. In doing so, this report also establishes a baseline for assessing how San Francisco's economy is likely to evolve in the future. While many of the specific numbers presented may have changed with the downturn of the past two years, the basic picture has not. This report should be updated periodically and complemented by research on how San Francisco's economy is changing over the short- and long-term.

INSIDE	Page
Size, regional context	*1*
Economic activities	*4*
Employer size	*9*
Spatial distribution	*11*
Conclusions	*12*
Sources of labor market data	*15*

Size and regional context

1. With approximately 600,000 jobs, 40,000 employers and a local GDP of about $75 billion, the City and County of San Francisco is an important component of the Bay Area regional economy.
2. Nearly half of San Francisco's workforce commutes in from surrounding communities while 20% of its employed residents commute out.
3. Over the last 30 years, San Francisco's employment has grown slower than surrounding Bay Area communities, even during the boom of the late 1990's, likely due to space constraints and the city's economic maturity.

Economic activities

4. The city's economy is particularly dependent on several external factors such as global tourism, the health of financial markets, business spending on IT, and overall government spending.
5. The city's employment is diversified across many industries, but is particularly concentrated in finance, insurance, real estate, business services and government administration.
6. The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's service industry. During this time, government and finance employment has been flat, trade has grown steadily, and transportation, communications, utilities and construction have recently rebounded.
7. The city's occupational structure reflects its industrial distribution, with many high-wage professional and low-wage service jobs, but few moderately-paid blue-collar jobs.

Employer size

8. While most San Francisco employers are small, employment is spread fairly evenly across large, medium and small employers. The typical San Francisco worker is part of a 100-person firm.
9. The city's largest employers include government, educational and health organizations such as the City and County, UCSF, and the local school district and major corporate offices of Wells Fargo, AT&T, PG&E, and SBC, among others.

Spatial distribution

10. More than half of the city's employment is concentrated in the office-heavy Financial and SOMA districts. Other areas have fewer jobs and a resident-serving (non office) focus.

Research Briefs are prepared periodically to inform the workforce and economic development communities about various topics related to San Francisco's economy and labor market. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

This report was written by Kevin Stange, Research Analyst for WISF. (415) 557-6569; Kevin_Stange@ci.sf.ca.us.

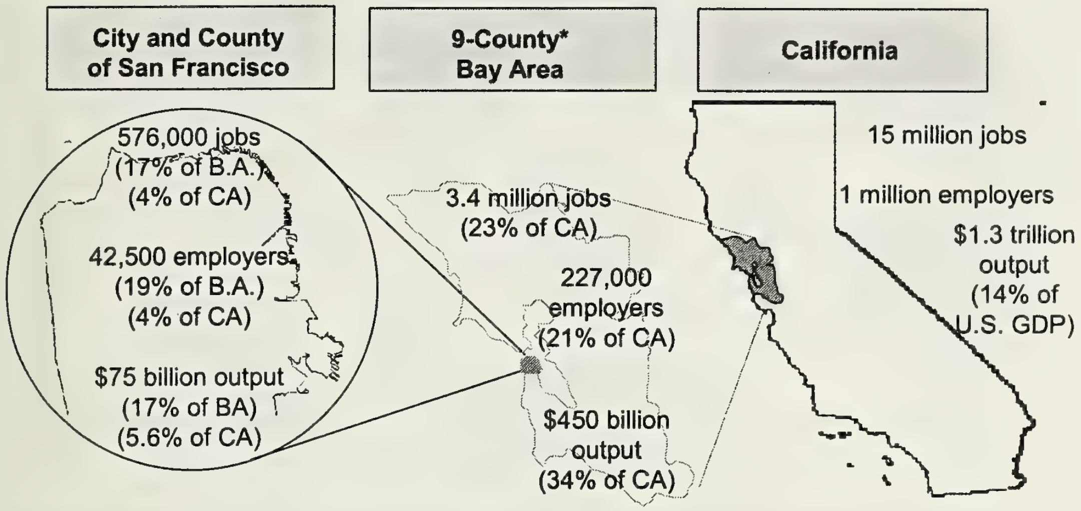
The author would like to especially thank John Crapo of the San Francisco Center for Economic Development, Abby Snay of Jewish Vocational Services, and Ed Champlin and Paak-Yin Tam of EDD for valuable feedback on this research.

SIZE, REGIONAL CONTEXT, AND HISTORICAL GROWTH

1. With approximately 600,000 jobs, 40,000 employers, and a local GDP of about $75 billion, the City and County of San Francisco is an important component of the Bay Area regional economy.

FIGURE 1

Employment and Number of Employers,* 2001
Economic Output, 2000


City and County of San Francisco
9-County* Bay Area
California
576,000 jobs
(17% of B.A.)
(4% of CA)
42,500 employers
(19% of B.A.)
(4% of CA)
$75 billion output
(17% of BA)
(5.6% of CA)
3.4 million jobs
(23% of CA)
227,000 employers
(21% of CA)
$450 billion output
(34% of CA)
15 million jobs
1 million employers
$1.3 trillion output
(14% of U.S. GDP)

* Excludes the self-employed, unpaid family workers, and select other classes of worker
** Includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties
SOURCE: California Employment Development Department, McKinsey & Company, US Bureau of Economic Analysis

While the exact number of jobs and employers in San Francisco's economy has fluctuated over the recent economic cycle, it is currently composed of approximately 600,0000 jobs and 40,000 employers. San Francisco accounts for slightly less than 20% of the 3.4 million jobs and 230,000 employers in the 9-county San Francisco Bay Area[1], and 4% of the 15 million jobs and 1 million employers in the state of California.[2]

The San Francisco Bay Area is also one of the most economically productive in the country. Research by McKinsey and Company on behalf of the Bay Area Economic Forum, the Bay Area Council, and the Association of Bay Area Governments estimates that San Francisco workers and businesses generated approximately $75 billion of economic output (GDP) in 2000, which represents about 17% and 5.6% of Bay Area and California economic output, respectively.

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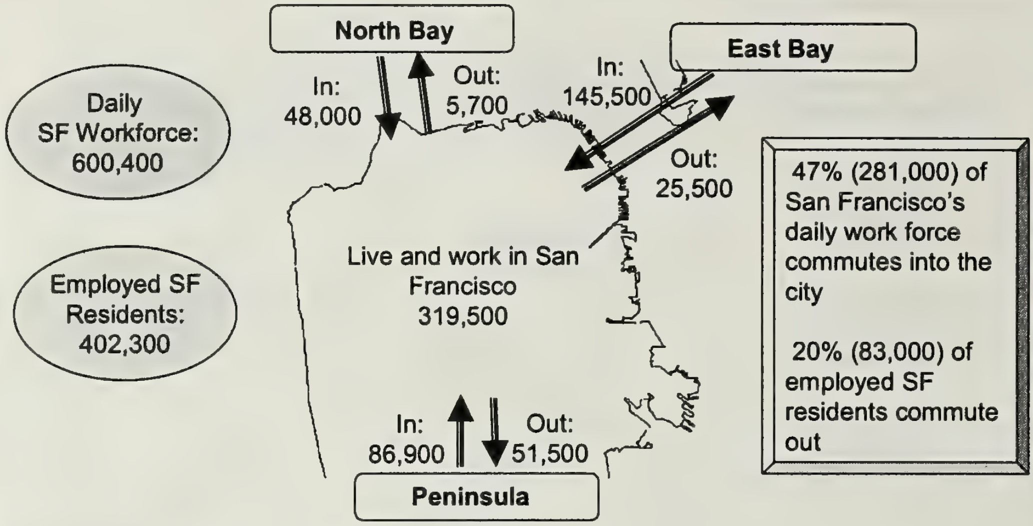
[1] Throughout this report, the City and County of San Francisco is compared with the 9-county San Francisco Bay Area region, which includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma counties.

[2] Estimates include a significant number of private household employers and workers, which are excluded from most of the analysis that follows. In San Francisco, there were 12,000 private households employing 9,000 individuals in 2001. The Bay Area had 42,000 employing 29,000 workers and California had 224,000 employing 170,000 workers.

2. San Francisco is highly integrated with this regional economy – nearly half of its workforce commutes in from surrounding communities while 20% of San Francisco's employed residents commute out.

FIGURE 2

Daily commuters to and from San Francisco
Number of workers, 2000


North Bay
In: 48,000
Out: 5,700
East Bay
In: 145,500
Out: 25,500
Daily SF Workforce: 600,400
Employed SF Residents: 402,300
Live and work in San Francisco 319,500
In: 86,900
Out: 51,500
Peninsula

47% (281,000) of San Francisco's daily work force commutes into the city

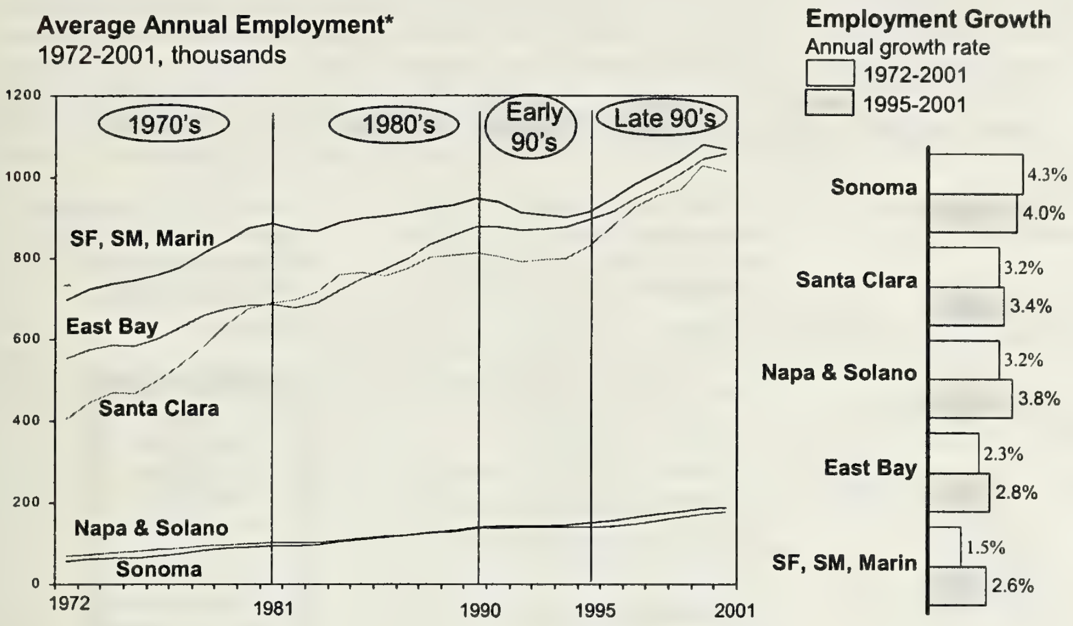
20% (83,000) of employed SF residents commute out

SOURCE: Metropolitan Transportation Commission

In at least one important way – having a shared labor force – the city of San Francisco is highly integrated with the surrounding Bay Area. Nearly half of San Francisco's workforce commutes into jobs from outside the city, while only slightly more than half of the city's workers actually live within the city limits. Nearly 150,000 workers commute daily from the East Bay alone – approximately one quarter of the city's 600,000-strong workforce. Reverse commuters – city residents that work outside of the city – account for 20% of the city's employed residents. Silicon Valley on the peninsula is the primary destination for San Francisco residents who work outside of the city, attracting more than 50,000 reverse commuters a day.

3. Over the last 30 years, San Francisco's employment has grown at a slower rate than surrounding Bay Area communities, even during the boom of the late 1990's. The city's constrained physical space and industrial maturity likely explain this slow growth.

FIGURE 3



Average Annual Employment*
1972-2001, thousands

Employment Growth
Annual growth rate

*Jobs are classified by place ofw ork, regardless of where the employee lives. Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.
SOURCE: US Bureau of Labor Statistics Current Employment Statistics program

Over the last 30 years, San Francisco's economy has typically grown at a slower rate than surrounding Bay Area communities. High tech manufacturing fueled an explosion of employment in Santa Clara in the 1970s, while broad-based expansion in trade and services propelled East Bay growth in the 1980s. Together, the western counties of San Francisco, San Mateo, and Marin have not seen a comparable period of rapid employment growth in the last 30 years. As a result, total employment growth has averaged just 1.5% annually since 1972, the lowest rate (on a percentage basis) in the Bay Area. Even during the economic boom of the late 1990's, the 3 western counties grew just 2.6% annually, which was the slowest rate in the region.

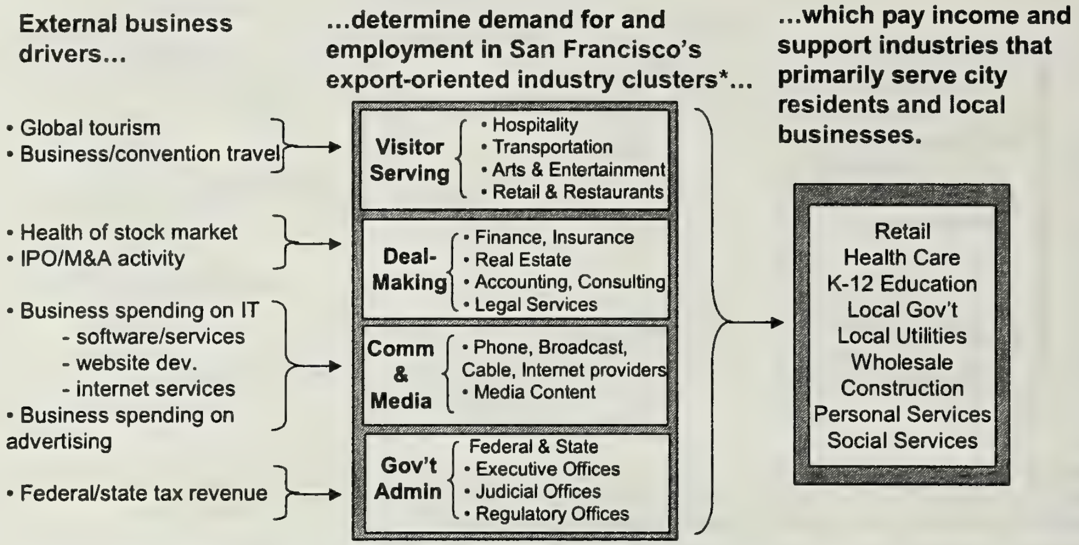
The city's slow growth is likely explained by San Francisco's constrained physical space and the maturity of its economy. With a mere 47 square miles, almost all of which is already developed, the city of San Francisco has significantly less physical room for business and housing expansion than surrounding communities. In addition, many of San Francisco's current major industries had already developed by 1970. This economic maturity makes rapid industrial transformation – and the rapid employment growth that often accompanies it – more difficult than in communities whose major industries have emerged more recently. It should be noted that lower-than-average growth does not necessarily mean increased overall employment stability – the recent doubling of the unemployment rate over the last two years has demonstrated that San Francisco is just as susceptible to an economic decline as anywhere else.

ECONOMIC ACTIVITIES: INDUSTRIES AND OCCUPATIONS

4. San Francisco's economy is dependent on external factors such as global tourism, the health of financial markets, business spending on information technology, and overall government spending. The city's visitor services, corporate deal-making, communications/media, and government administration industries, which chiefly fuel local employment growth, are especially susceptible to these factors.

FIGURE 4

Drivers of San Francisco's Economy


External business drivers...
...determine demand for and employment in San Francisco's export-oriented industry clusters*...
...which pay income and support industries that primarily serve city residents and local businesses.
• Global tourism
• Business/convention travel
• Health of stock market
• IPO/M&A activity
• Business spending on IT
- software/services
- website dev.
- internet services
• Business spending on advertising
• Federal/state tax revenue
Visitor Serving
• Hospitality
• Transportation
• Arts & Entertainment
• Retail & Restaurants
Deal-Making
• Finance, Insurance
• Real Estate
• Accounting, Consulting
• Legal Services
Comm & Media
• Phone, Broadcast, Cable, Internet providers
• Media Content
Gov't Admin
Federal & State
• Executive Offices
• Judicial Offices
• Regulatory Offices
Retail
Health Care
K-12 Education
Local Gov't
Local Utilities
Wholesale
Construction
Personal Services
Social Services

* Many industries, retail for example, sell goods or services to both residents and non-residents and thus are both export and resident-serving industries.
SOURCE: Sims, Kent 2000. "San Francisco Economy:Implications for Public Policy," San Francisco Planning and Urban Research Association (SPUR) and the San Francisco Center for Economic Development.

San Francisco, like any local economy, is highly dependent on what goes on in the national and state economies. Factors such as global tourism and business travel, the health of financial markets, business spending on information technology and advertising, and federal and state government spending are all determined outside of San Francisco, but have an enormous impact on the local economy. These factors determine demand for, and employment in San Francisco's export-oriented clusters of industries: visitor services, corporate deal-making (finance, insurance, real estate, accounting, consulting, and legal services), communications and media content, and government administration.

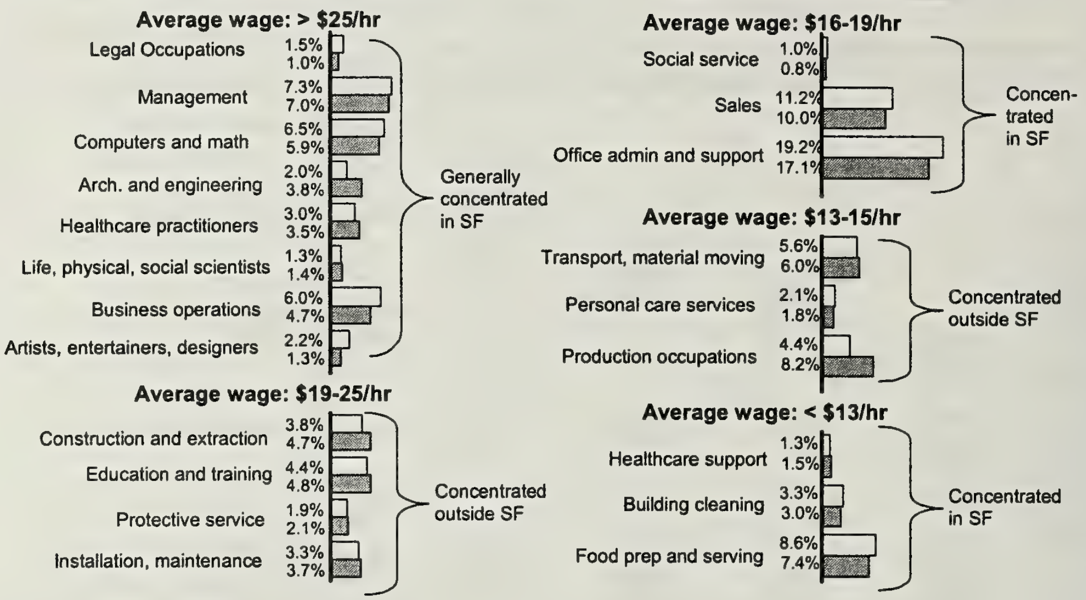
Export-oriented industry clusters can be identified by their cross-industry dependence and their customers –primarily businesses and consumers who operate or live outside of the city. Tourism provides a simple example of what is meant by an export industry cluster. A tourist may visit San Francisco because of its collection of high-caliber performing arts venues, shopping and dining options, and luxurious hotels. During her stay, she will likely be served by all of these industries and the regional transportation (air, taxi, bus) system. The health of these industries, which collectively constitute the "Visitor Serving" cluster, rests on at least one common factor (global tourism) and their ability to collectively fill the existing demand for it. If one component fails (for example, the performance arts venues were no longer a draw or airport congestion deterred travelers), the entire cluster suffers. San Francisco's collection of legal, investment banking, and consulting services firms are similarly dependent on corporate deal-making such as mergers and acquisition activity.

In addition to their large direct effects on the local economy – hiring local residents and purchasing from local businesses – export industries indirectly support the rest of the economy by paying income that residents use to purchase health care, elementary education, and local government. This indirect effect on employment is often referred to as the "multiplier effect." Because of the large "multiplier effect" of export industries, local employment is particularly dependent on the aforementioned external business factors. It should be noted that the relevant export industry clusters and business factors are different for every local economy. To take one example, Silicon Valley is particularly dependent on the global demand for the technology hardware that is manufactured there (e.g. telecommunications equipment), while the global demand for technology services – not hardware – is more important to San Francisco's economy.

7. San Francisco's occupational structure reflects its industrial distribution, with many high-wage professional and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs than the rest of the Bay Area.

FIGURE 7

Share of Total Employment, 2000



*Occupation data not available at county level
Note: Occupational categories are listed in descending order from highest to lowest average wage.
SOURCE: US Bureau of Labor Statistics Occupational Employment Statistics Survey

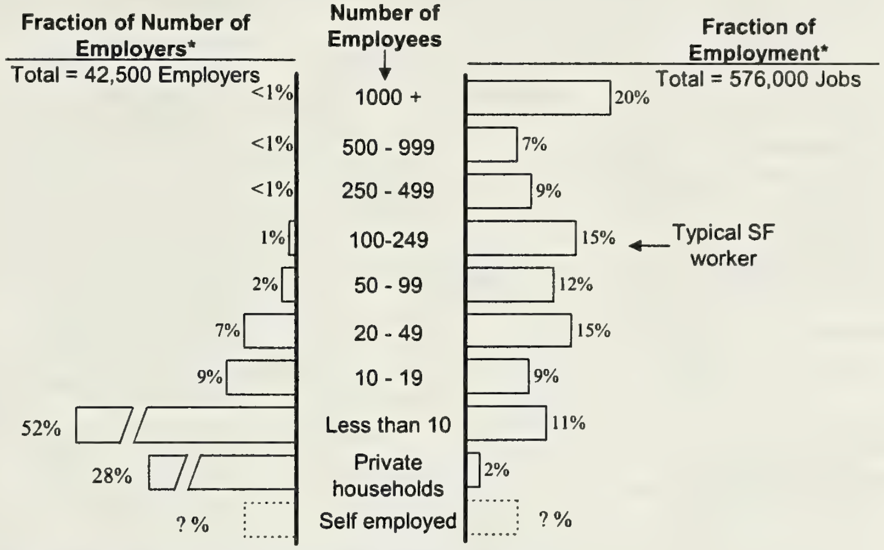
The city's occupational structure is a result of its industrial distribution. As the home of many corporate headquarters, business service firms, and financial institutions, San Francisco employs relatively more highly paid lawyers, managers, computer scientists, and business operations professionals than the Bay Area overall. These same industries also require a sizeable workforce of moderately paid sales and office support professionals. In contrast, a lack of industrial activity in San Francisco requires fewer blue-collar workers – construction, installation, maintenance, and production workers are all less concentrated in San Francisco than throughout the Bay Area. Lastly, San Francisco's abundance of office buildings, hotels and restaurants rely on a large pool of building cleaners and food service workers – very low wage service jobs that are also relatively more numerous in the city.

EMPLOYER SIZE

8. While most San Francisco employers are small, employment is spread fairly evenly across large, medium, and small employers. The typical San Francisco worker is part of a 100-person firm.

FIGURE 8

Share of Employment by Employer Size
San Francisco County, 2001



* Totals and share do not include the self-employed and unpaid family workers
SOURCE: California Employment Development Department, Size of Business report

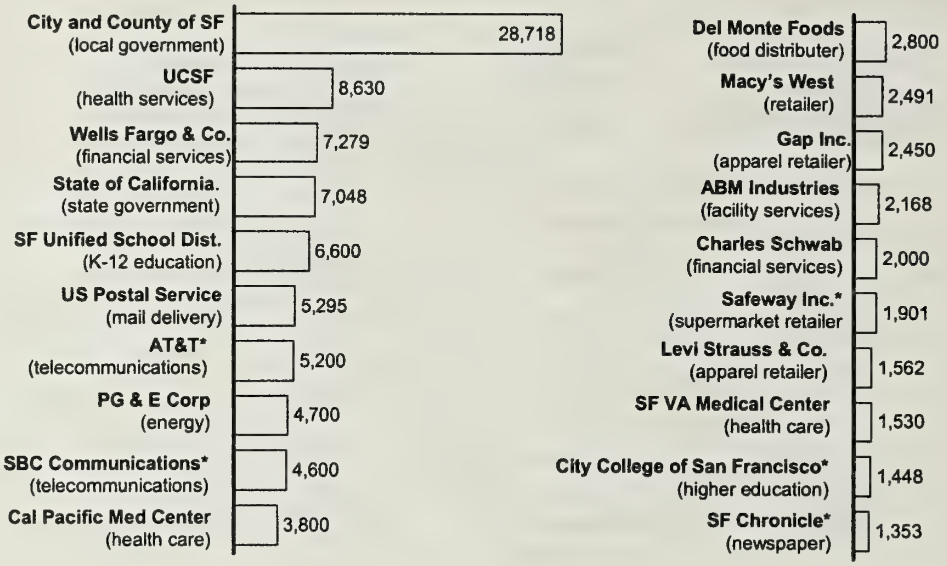
From the local corner grocer to the headquarters of a multinational corporation, San Francisco's employers are as varied in size as they are in industry. About fifty employers are very large with 1000 or more employees, while more than 30,000 – 80% of the total – employ fewer than 10 people. While most employers are very small, employment is spread fairly evenly across large, medium, and small ones and the typical (median) San Francisco worker is part of a 100-person organization. About 1% of San Francisco employers are large with at least 250 employees, and employ about 36% of the workforce. About 3% are medium-sized (50-250 employees), accounting for about 27% of the workforce. Ninety-six percent of employers are small with fewer than 50 employees, hiring 36% of the city's workforce.

Many ofS an Francisco's smallest employers are private households who hire individuals to do work around the house – housekeeping and gardening work, for instance. However, these type of arrangements do not account for a significant share of the city's employment. The number of self-employed individuals and unpaid family workers are notoriously difficult to measure regularly and are not included in these estimates. However, the 2000 Census found that 37,000 San Francisco residents were self employed and 1,000 worked for no pay in a family business in 2000.

9. San Francisco's largest employers span a wide range of industries. Government, educational and health organizations such as the City and County, UCSF, the State of California, and the local school district and corporate offices of Wells Fargo, AT&T, PG&E, and SBC are among the city's largest employers.

FIGURE 9

Number of Full-Time Employees in San Francisco County, 2002



NOTE: Rank is determined by full time employees working in the county of San Francisco. The US Federal Government, Bank of America, and McKesson Corp. did not respond to survey, but are also major San Francisco employers. An "*" indicates figures reflects 2001 survey response.
SOURCE: San Francisco Business Times

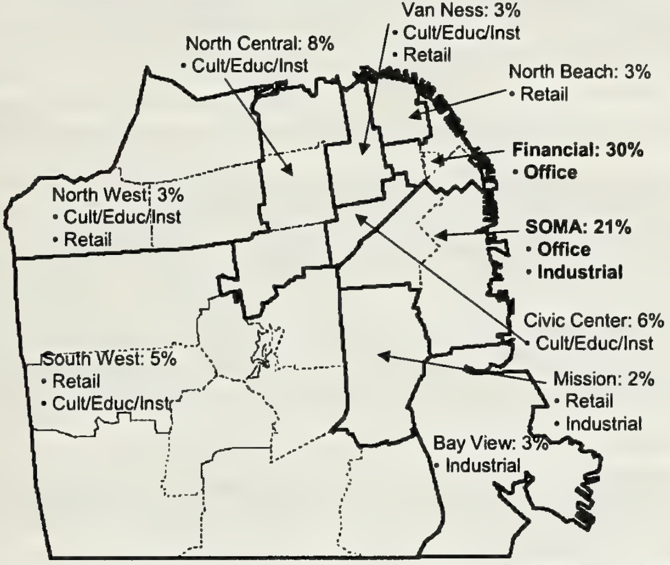
As is typical in most local economies, many of San Francisco's largest employers are government, educational, and health institutions. In fact, four of the city's five largest employers – local government, the University of California San Francisco (UCSF), the State of California, and the city's local school system fall into these categories. Local government alone directly employs nearly 30,000 workers. What distinguishes San Francisco from other locales, however, is the number of corporate headquarters or major regional offices that are among the city's major employers. Wells Fargo, AT&T, PG&E, and SBC all maintain large corporate staff at their offices within the city.

SPATIAL DISTRIBUTION

10. More than half of San Francisco's employment is concentrated in the office-heavy Financial and SOMA districts. Other areas have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

FIGURE 10

Fraction of San Francisco Employment by Business District and Land Use
San Francisco County, 2000


Van Ness: 3%
• Cult/Educ/Inst
• Retail
North Central: 8%
• Cult/Educ/Inst
North Beach: 3%
• Retail
Financial: 30%
• Office
North West: 3%
• Cult/Educ/Inst
• Retail
SOMA: 21%
• Office
• Industrial
Civic Center: 6%
• Cult/Educ/Inst
South West: 5%
• Retail
• Cult/Educ/Inst
Mission: 2%
• Retail
• Industrial
Bay View: 3%
• Industrial
Commerce and Industry District Boundaries
ZIP Code Boundaries

Primary Business Land Uses*	Share of Total SF Employment
Office	37%
Cultural/Educ/Inst**	23%
Industrial	20%
Retail	17%
Hotel	3%

* Each district's primary business land uses (at least one quarter of a district's employment) are identified on the map
** Includes schools, hospitals, clinics, social service facilities, museums, movie theaters, and other recreational facilities
Note: 16% of employment was not classifiable by location (see end note)
SOURCE: San Francisco Planning Department, "Commerce and Industry Inventory 2001"

The level and type of economic activity in San Francisco varies considerably between its neighborhoods. Because of its office space density, the Financial and SOMA districts in the Northeast section of the city account for more than half of the city's employment. The other neighborhoods, where the vast majority of residents live, have relatively little economic activity and most employment occurs in retail stores, schools, hospitals and other resident-serving functions. For instance, the Stonestown mall and the main campuses of San Francisco State University and City College are major employers in the Southwest district, while several hospitals and UCSF are anchor employers in the Northcentral region (Western Addition, Haight). Most industrial activity is located in the city's eastern neighborhoods: the Bay View, Mission, and SOMA.

Conclusions and Recommendations

This report provided a basic orientation to the size, structure, and historical evolution of San Francisco's economy and employer base and established a baseline for assessing how this base is changing.

It is expected that readers of this report will be quite diverse – from economic policy-makers to training providers and business leaders to tax collectors. Because of this diversity of audience, this report has purposely avoided identifying specific implications of this research for the reader – implications that will vary dramatically depending on the reader's vantage point. Following the report's release, Workforce Investment San Francisco will articulate implications of this work for several of the primary groups of likely readers. These will be made available at www.picsf.org.

Despite this diversity, there are several implications of the economic picture presented herein that are likely to be relevant to most readers.

1. **Importance of regionalism**. San Francisco is far from a closed economy. San Francisco employers tap the entire Bay Area for their workforce and many residents work outside the city. A regional approach to economic and workforce development is essential to its effectiveness.
2. **Focus on primary economic drivers**.While employment spans all industries, San Francisco's economy is driven largely by a handful of external factors such as tourism and the health of financial markets. These factors have a huge impact (directly and indirectly) on the level and nature of employment in all industries, and thus should be watched closely.
3. **Importance of internal growth**. With less room for physical expansion than surrounding areas, the city of San Francisco must rely on growing and retaining existing businesses and utilizing existing office capacity to fuel its growth, while abandoned land is slowly converted to more modern uses.
4. **Recognize employer diversity**. Organizations of all sizes, industries, and ownership structures (for-profit, government, non-profit) represent a significant share of employment in San Francisco. A comprehensive economic and workforce development plan should respond to this diversity.

This picture should be updated periodically and complemented by research on how San Francisco's economy – and that of Bay Area region overall – is changing in the short- and long-term. Several of the most useful sources for such information are profiled at the end of this report.

* * * * *

San Francisco, as the center point of a dynamic and diverse regional economy, continues to undergo significant transformation. The completion of the Mission Bay development, the expansion of public transit infrastructure along 3rd Street and to San Francisco International Airport, a new Ferry Building and Convention Center, the conversion of the Presidio to private uses – all will significantly alter the face of San Francisco's economy and labor market. This report has established a baseline against which these changes can be measured.

END NOTES DATA SOURCES USED

Figure 1
Employment and number of employers by county and for the state were obtained from the California Employment Development Department's (EDD) "Size of Business" report (see next chapter). Special tabulations were performed by EDD in order to estimate the number of private household employers (private individuals who hire other individuals to clean their house or tend their garden, for instance), which are typically counted as businesses in this report. Gross Output by county was obtained by special request to the McKinsey & Company team that authored the report *After the Bubble: Sustaining Economic Prosperity*, published by the Bay Area Economic Forum in January 2002. This report, which contains a detailed description of their methodology, is available at http://www.bayeconfor.org. Gross output (GDP) for the state of California and the U.S. overall are available form the U.S. Bureau of Economic Analysis (www.bea.gov).

Figure 2
County-to-county commute patterns in the San Francisco Bay Area were obtained from the Metropolitan Transportation Commission at http://www.mtc.ca.gov/datamart/stats.htm. Values represent average daily commuters for a typical weekday, including those working at home or traveling to work by any means of transportation. Estimates are based on the Association of Bay Area Government's Projections 2000 data and 1990 Census journey-to-work data. Commute patterns will be updated next in late 2003, when county-to-county journey-to-work data is made available from Census 2000. "North Bay" includes all commuters from Marin, Sonoma, and Mendocino counties; "Penninsula" includes all those from San Mateo, Santa Clara, Santa Cruz, Monterey, and San Benito counties; and "East Bay" includes all commuters from Alameda, Contra Costa, Solano, Sacramento, Napa and other surrounding counties.

Figure 3
Average annual employment (total and by industry) by Metropolitan Statistical Area (1972-2001) was obtained from the U.S. Bureau of Labor Statistics Current Employment Statistics Program.. Since data is derived from survey and payroll information from employers (see next chapter), jobs are classified by place of work, regardless of where the employee lives. Additionally, this estimate does not include agricultural workers, the self employed, unpaid family workers, and private household employees, while multiple job holders may be counted twice. Analysis was performed at the MSA level in order to examine long-term trends: data is not available for SF County specifically prior to 1988. Prior to 1972, Oakland MSA (the "East Bay") was included with SF MSA.

Figure 4
Many of the ideas presented here were drawn from Kent Sims' report "San Francisco Economy: Implications for Public Policy," prepared for the San Francisco Planning and Urban Research Association, July 10, 2000, and through discussions with the San Francisco Center for Economic Development. Sims' report is available at www.spur.org.

Figure 5
Average annual employment (total and by industry) for the 9 Bay Area counties and for the U.S. overall was obtained from the U.S. Bureau of Labor Statistics Current Employment Statistics Program. Since data is derived from survey and payroll information from employers (see next chapter), jobs are classified by place of work, regardless of where the employee lives. Additionally, this estimate does not include agricultural workers, the self employed, unpaid family workers, and private household employees, while multiple job holders may be counted twice. Estimates of employment in engineering and management and private educational services were not available for Napa, Sonoma, and Solano counties, and were thus not available for the Bay Area. With 2.4% of employment in San Francisco, amusement services is the largest industry that

is not displayed – employment estimates for this industry are not available for most other counties.

Figure 6
See notes for Figure 3.

Figure 7
Annual employment and average wage by occupation for the 5 Bay Area Metropolitan Statistical Areas (MSA), California, and the U.S. was obtained from the U.S. Bureau of Labor Statistics Occupational Employment Statistics Survey program. Though wages are not shown in the chart, occupational categories are listed in descending order by average wage. Lawyers and other legal professionals earned the most in San Francisco, at $42 per hour, while food preparation and other food service workers earned the least at $9.66 per hour. Occupational comparisons between San Francisco and California or the U.S. yield similar conclusions as comparisons between San Francisco and the rest of the Bay Area.

Figure 8
Employment and number of employers for San Francisco County were obtained from the California Employment Development Department's (EDD) "Size of Business" report (see next chapter). Special tabulations were performed by EDD in order to estimate the number of private household employers (private individuals who hire other individuals to clean their house or tend their garden, for instance), which are not typically separated out from more traditional employers (e.g. private firms and government entities). These private household employers overwhelmingly fall into the "less than 10" size category.

Figure 9
Names, business description, and number of SF-based employees of San Francisco County's largest employers were obtained from San Francisco Business Times (January 17, 2003; page 24). San Francisco Business Times collects the data through surveys of major San Francisco employers and ranks organizations based on number of full time employees at the time of the survey. Some organizations (City College of San Francisco, for instance) may have many part-time workers which are not included in this analsyis.

Figure 10
Employment by business district and land use was obtained from Chapter 3 of the San Francisco Planning Department's 2001 Commerce and Industry Inventory report. The Planning Department obtains raw employment data for each establishment in San Francisco from the Employment Development Department (EDD) and categorizes these establishments by commerce district and primary land use (as defined by the Planning Department). Unfortunately, the physical location of many establishments (representing 16% of employment) could not be determined, and were thus not assigned to any specific commerce district. As a result, the employment shares shown in the figure do not add to 100%. However, the fact that the land use of these unclassified establishments mirrors that of the city overall suggests that they may be distributed across the city in proportion to classifiable employment.

SOURCES OF LABOR MARKET INFORMATION

The primary sources for local and regional economic and labor market data are profiled below, most of which are made available by the California Economic Development Department (EDD) and the U.S. Bureau of Labor Statistics (BLS). Additionally, many other organizations make information on specific topics available to the public, several of which were used in this report. The Metropolitan Transportation Commission, Association of Bay Area Governments, SF Planning Department, the San Francisco Businesses Times all collect and disseminate very useful information about San Francisco's economy and employers.

Labor force and unemployment

Data items: Number of people in labor force, number employed, number unemployed, unemployment rate overall and by demographic and other characteristics.
Sources of data: Monthly survey of individuals, the Current Population Survey.
Coverage: All non-institutionalized civilians.All U.S. and state data is seasonally adjusted, county is not.
Geographic scope: U.S., states, counties, some subcounties. Some detail only available for U.S. and states.
Timing: Monthly
To access: California and counties: EDD (http://www.calmis.ca.gov/htmlfile/subject/lftable.htm)
U.S. and other states: BLS (http://www.bls.gov/cps/)

Size of Business Report

Data items: Employment, payroll, establishment count by size and broad industry category.
Source of data: Employers' quarterly payroll records submitted to the State of California.
Coverage: Any employer and employee subject to the California Unemployment Insurance code. Excluded workers include: the self-employed, private household workers making less than $1,000 in the quarter, unpaid family workers, illegal aliens, public/non-profit school employees between academic terms or during vacation or holidays, and interstate railroad employees. Excluded establishments (employers) include businesses with no employees that are covered (as determined by above). Companies that operate more than one establishment are counted separately for each individual establishment
Geographic scope: California and California counties. Industry cross-tabulation available at MSA level.
Timing: Released annually, only covers the 3rd Quarter of each year.
To access: EDD (http://www.calmis.ca.gov/htmlfile/subject/indsize.htm)

Current Employment Statistics program (Industry Employment)

Data items: Employment by detailed industry category.
Sources of data: Monthly survey of employers, benchmarked annually to employers' quarterly payroll records submitted to the State of California.
Coverage: All wage and salary workers. Excluded workers include: the self-employed, private household workers, unpaid family workers, illegal aliens, public/non-profit school employees between academic terms or during vacation or holidays, and interstate railroad employees. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, MSA, and counties.
Timing: Released monthly at the MSA level and above, monthly county data is available only after the annual benchmark, which has a one year lag (e.g. 2001 county-level data is available currently)
To access: California (MSA, counties): EDD (http://www.calmis.ca.gov/htmlfile/subject/indtable.htm)
U.S. (and non-California areas): BLS (http://www.bls.gov/ces/)

Occupational Employment Statistics program (Occupational Employment)

Data items: Employment and wage range (mean, median, percentiles) by detailed occupational category.
Sources of data: Yearly mail survey of employers, drawn from the universe of employers' quarterly payroll records submitted to the State of California.
Coverage: All wage and salary workers in non-farm industries, both full and part time. Excluded workers include the self-employed, private household workers, and unpaid family workers.
Geographic scope: U.S., state, and MSA
Timing: Released annually. Employment levels have a one year lag, but wages are for most recent year (e.g. employment by occupation is currently available for 2001, wages by occupation are for 2002)
To access: California (MSAs): EDD (http://www.calmis.ca.gov/file/occup$/oes$.htm)
U.S. (and non-California areas): BLS (http://www.bls.gov/oes/)

Occupational Staffing Patterns (major occupations in an industry)

Data items: Distribution of employment for a specific occupation among industries and occupational employment distribution for a specific industry, current and ten-year forecast.
Sources of data: Yearly mail survey of employers about their occupations (see OES program, above) generates the current year distribution of occupations by industry (the Industry-Occupation staffing matrix). Staffing projections are made in conjunction with overall industry and occupational projections (see below).
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S. and states
Timing: Revised every two years to incorporate recent economic changes. The next update (covering 2002-2012) will be released near the end of 2003.
To access: California: EDD (http://www.calmis.ca.gov/file/IOMatrix/Staffing-Patterns1.htm)
U.S. and other states: BLS (http://data.bls.gov/oep/nioem/empiohm.jsp)

Industry Projections

Data items: Ten and seven year forecasts (for counties and California, respectively) of employment levels and growth rates by detailed industry category.
Sources of data: Historical and current employment by industry from the Current Employment Statistics program (see above) is projected forward using a complex methodology to account for shifts in population, labor force, aggregate economic conditions, final economic demand, and production methods in each industry. (See BLS website for more detail)
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state and county level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, and county.
Timing: Revised every two years to incorporate recent economic changes. Projections from 1999 to 2006 are currently available for California counties, as are projections from 2000 to 2010 for California overall.
To access: California and counties: EDD (**http://www.calmis.ca.gov/htmlfile/subject/indproj.htm**)
U.S. and other states: BLS (http://www.bls.gov/emp/)

Occupational Projections

Data items: Ten and seven year forecasts (for counties and California, respectively) of employment levels, job openings, growth rates, and training requirements by detailed occupational category.
Sources of data: Projected occupational staffing patterns are applied to employment projections by industry to generate occupational projections (see above).
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state and county level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, and county.
Timing: Revised every two years to incorporate recent economic changes. Projections from 1999 to 2006 are currently available for California counties, as are projections from 2000 to 2010 for California overall.
To access: California and counties: EDD (http://www.calmis.ca.gov/htmlfile/subject/occproj.htm)
U.S. and other states: BLS (http://www.bls.gov/emp/)

SF Prospector

Data items: Various business, workforce, real estate, demographic, planning, and geographic information and data by very detailed location (ZIP code, Supervisor district, neighborhood).
Sources of data: many sources
Coverage: Individuals and businesses living, working, or operating in San Francisco, depending on specific data item.
Geographic scope: San Francisco only
Timing: Updated periodically.
To access: www.sfprospector.com

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

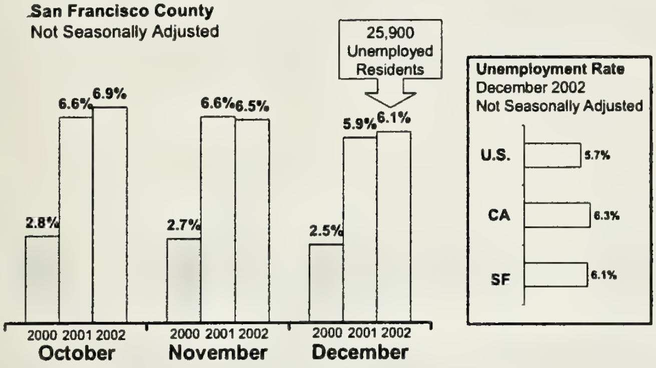
Quarterly Briefing:
San Francisco's Labor Market

A Publication to Inform
San Francisco's Workforce and Economic Development Community
February 2003

Unemployment Level Approaches 26,000, Unemployment Rate at 6.1%

FIGURE 1

Unemployment Rate
San Francisco County
Not Seasonally Adjusted



SOURCE: California Employment Development Department, Current Employment Statistics Survey

Nearly 26,000 San Francisco residents were unemployed at the end of 2002, 6.1% of the city's labor force. While demand is typically strong in December due to holiday shopping (as seen by the declining unemployment rate from October to December), unemployment still stood higher at the end of 2002 than 2001.

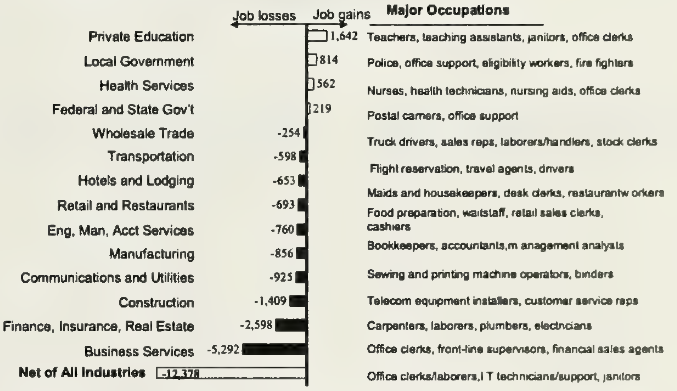
While San Francisco compared favorably to the rest of California, whose unemployment rate stood at 6.3% in December, it still continued to lag the rest of the United States.

Net San Francisco Job Loss Totals 12,000 for 2002

Job loss was widespread during 2002, totaling more than 12,000 net jobs lost. The few exceptions were Health Care, Education, and the Government, all of which added jobs last year. Given pressures on state and local government finances, it is unclear whether this growth will continue. Business services, finance, and construction accounted for the vast majority of this decline.

FIGURE 2

Net Employment Change, San Francisco County
4Q-2001 to 4Q-2002



SOURCE: California EmploymentD evelopment Department, CurrentE mployment Statistics Survey,I ndustry Staffing Patterns

Short Term Outlook:
No Sign of Improvement

The San Francisco job market has yet to show significant signs of improvement and may be adversely affected by government spending cuts that halt (and possibly reverse) employment growth in the few bright sectors during 2002.

San Francisco's Labor Market is prepared quarterly to inform the workforce and economic development communities about short term changes in San Francisco's economy and labor market. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

This report was prepared by Kevin Stange, Research Analyst for WISF. (415) 557-6569; Kevin_Stange@ci.sf.ca.us.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

'74
/
heduled
4/30/03

Please note the rescheduled date on the attached notice of the April Workforce Investment San Francisco Board meeting.

The scheduled April 16th date has been rescheduled to April 30th.

Thank you for your immediate attention.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date:	Wednesday, April 30, 2003
Time:	9:30 a.m. – 11:30 a.m.
Location:	TBA

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DRAFT AGENDA TO BE SENT AT A LATER DATE

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(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
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San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, March 12, 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date:	Wednesday, April 30, 2003
Time:	9:30 a.m. – 11:30 a.m.
Location:	SBC Conference Center 370 Third Street San Francisco, CA 94107

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AGENDA APPEARS ON THE REVERSE SIDE

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Issued: Wednesday, April 23, 2003

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, APRIL 30, 2003

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the February 19, 2003 meeting *(Action Item)***
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations by Kevin Stange, WISF Board Research Analyst
   A. "Quarterly Update: San Francisco's Labor Market"
   B. "Cross-program Outcome Assessment" *
5. Consent Calendar *(Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

   A. Proposed Action: Ratification of Allocation of WIA Title IB & ID Funds and Selection Criteria for Consulting Services to Facilitate Youth Council Strategic Planning
   B. Proposed Action: Ratification of Allocation of WIA Title IB & ID Funds to Support a Community-Wide Youth Service Providers Conference
   C. Proposed Action: Ratification of WIA Dislocated Worker and Adult Program Designs and Adult Request for Proposals (RFP) Selection and Evaluation Criteria
   D. Proposed Action: Ratification of Expansion of the Welfare-to-Work (WtW) Individual Referral (IR) Vendor List
   E. Proposed Action: Ratification of Welfare-to-Work (WtW) Evaluation Criteria
   F. Proposed Action: Ratification of One Stop Center Operator Recommendations
   G. Proposed Action: Ratification of One Stop Budget Priorities Recommendations
   H. Proposed Action: Ratification of Customized Training Recommendations
   I. Proposed Action: Ratification of Self-Sufficiency & WIA Adult Priority of Services Plan Recommendations
   J. Proposed Action: Ratification of Planning Considerations for Refugee Programs
   K. Proposed Action: Ratification of Planning Considerations for Homeless Employment Collaborative Program

6. Executive Committee Recommendations *(Action Item)**
   A. Proposed Action: Ratification of Welfare to Work Individual Referral Program Recommendations
   B. Proposed Action: Ratification of Additions to the Vendor List
   C. Proposed Action: Ratification of Welfare to Work Recommendations

8. President's Report (Discussion Item)
9. Chair's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment *(Action Item)*

* Information enclosed

** Information to be sent

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

Research Brief:
Adult Training Outcomes in San Francisco
April 2003

EXECUTIVE SUMMARY

This Research Brief was developed to provide members of San Francisco's workforce development and human service community an overview of the training and employment programs overseen by the Workforce Investment San Francisco Board (WISF) and to examine several factors that appear to influence the outcomes of these programs. This report aims to establish a baseline of training program performance – across all programs and for each one specifically – and to highlight potential means for improvement. WISF-funded training is a critical component of San Francisco's adult workforce development system and is relied on by countless City residents and employers every day.

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Program Overview	*2*
Program Completion	*5*
Employment Entry	*6*
Occupations & Job Quality	*8*
Conclusions	*12*
Future Work	*13*

Summary of Findings

- WISF trained more than 4,800 people over the past two years through its seven largest adult training programs. Trainees spanned the range of ages, races, experience, education, and unique challenges, the most common of which were lack of basic reading, writing, and math skills, limited English ability, single parenthood and homelessness.
- Pre-employment occupational classroom training, primarily through contracts to serve groups of clients, was the most common training type. Employer-oriented training such as On-the-Job (OJT) and customized training is still relatively rare.
- Overall, 74% of clients complete training, and nearly 60% enter employment for an average wage of $11.21 per hour. Of those that do find work, nearly 60% work full-time and about half receive health benefits.
  - Previous labor force attachment, completion of training, and the use of OJT appear to be associated with higher rates of entry into employment.
  - Disability, homelessness, teenage pregnancy, and public assistance recipiency are generally associated with lower rates of employment.
  - Age, education, and use of individual referral contracts do not appear to influence employment entry significantly.
- Occupational goals, as observed by training content, does appear to greatly influence the occupations clients enter and hence wage received: most clients enter jobs in housekeeping, office/clerical, health care, and IT following their training in those fields.
- Some dislocated workers who enroll in training may not actually need it – training completion appears to have no impact on the likelihood of these clients entering employment and many take better-paying jobs unrelated to their training.
- Little is known about clients who do not immediately enter employment after training.

Recommendations

- Focus on helping clients build attachment to the labor force and successfully complete their training programs.
- Expand the use of on-the-job training and other employer-oriented training.
- Choose occupations for training carefully based on demand, growth and job quality. Office clerical and receptionist jobs, moderately skilled health care jobs (nursing aids and medical assistants), and carpentry and other trades offer the most promise for higher wage employment.
- Pay more attention to determining which clients actually need costly training services, as opposed to job development exclusively.
- Implement processes to track clients that do not enter employment immediately after training.

Research Briefs are prepared periodically to inform the workforce and economic development communities about various topics related to San Francisco's labor market, economy, and workforce development system. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

This report was written by Kevin Stange, Research Analyst for WISF. (415) 557-6569; kevin_stange@ci.sf.ca.us

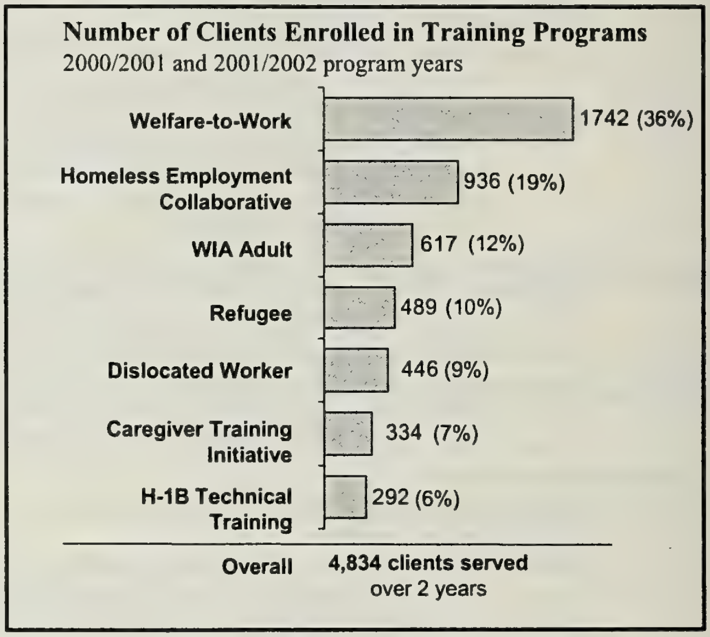
PART I: INTRODUCTION

This Research Brief provides an overview and high-level assessment of the seven major adult training and employment programs overseen by Workforce Investment San Francisco Board (WISF) and operated through its network of community and training partners over the past two years. This report establishes a baseline of training program performance along three outcome measures – completion, employment entry, and job quality – and examines several factors that may influence these outcomes. The report concludes by summarizing some of the major findings of this assessment and recommending system-wide and programmatic changes to improve training program performance.

PART II: PROFILE OF WISF ADULT TRAINING PROGRAMS

Workforce Investment San Francisco (WISF) directly oversees seven major employment and training programs for San Francisco adults. In total, these seven programs served more than 4,800 clients over the past two program years. The Welfare-to-Work (WTW) program accounts for more than one-third of all clients served in that time period, followed by the Homeless Employment Collaborative (HEC), which served more than 900. The Workforce Investment Act Adult and Dislocated Worker programs trained 600 and 450, respectively. The Refugee program trained nearly 500. WISF's two industry-specific training programs – the Caregiver Training Initiative (CTI) and the H-1B Technical Training Program – each served about 300 people over this time. In addition to the training services described herein, WISF provides job search, career counseling, and assessment services to thousands of San Franciscans every month.[1]

Reflecting the great diversity of employment and training needs of the community, there is no "typical client" of WISF programs. Clients span the spectrum of age, education, race, and unique employment challenges. Overall, the majority of clients are women and two-thirds are between 31 and 54 years of age. Asian, African American, Hispanic, and Caucasian clients are all served in significant numbers. Workforce Investment San Francisco has made a conscious decision to target some of San Francisco's neediest residents with its programs, and the demographic profile of its clients reflects that decision. The most common educational level is high school or GED, but many clients have either no HS



Number of Clients Enrolled in Training Programs
2000/2001 and 2001/2002 program years

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[1] This report also does not examine WISF-funded acculturation services for refugees 50 years or older (which is not employment-focused), and the Mission Bay First Source and Redevelopment Agency Consortium programs, for which comparable data was not available.

credential or some post-HS education. Less than 10% have a college degree. Many clients receive public assistance and most have one or more characteristics that make employment more difficult – insufficient basic reading, writing, and English skills, single parenthood, and homelessness are the most common. There is, however, significant variation in the characteristics of clients that each program serves. Table A-1 in the appendix provides a detailed breakdown of client characteristics for each program, but in general:

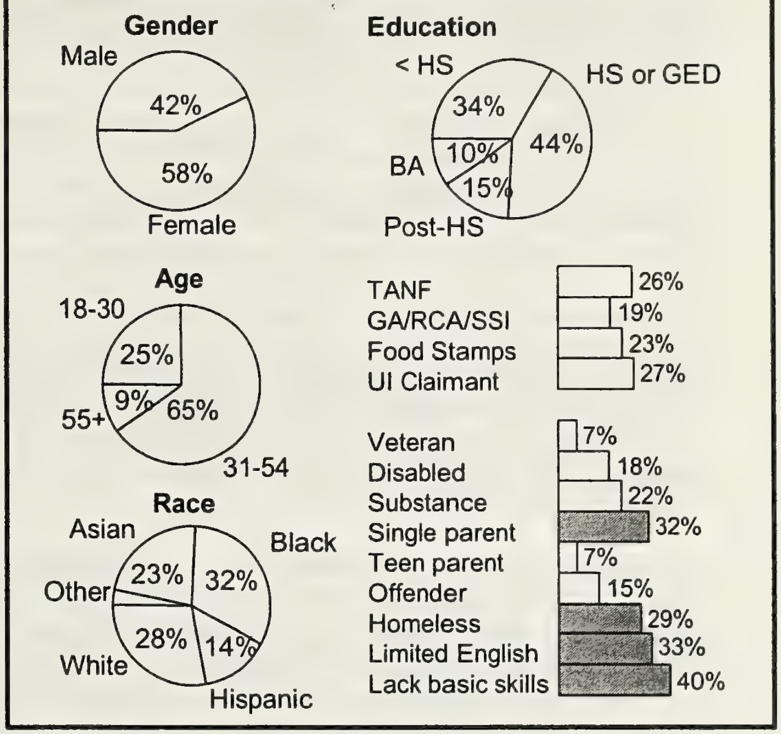
Welfare to Work serves younger, less educated women that are more likely to be African American and receiving TANF and Food Stamps. Single parenthood is their biggest employment challenge.

HEC largely serves men that are slightly older than average. HEC clients are more likely to be African American and receiving General Assistance (GA). All clients are homeless and many have disabilities and/or substance abuse problems

WIA Adult clients are slightly older, and more likely to be Asian or Hispanic and HS graduates. A lack of basic or English skills is their primary employment challenges.

Characteristics of Clients

Fraction of clients with characteristic,
2000/2001 and 2001/2002 program years

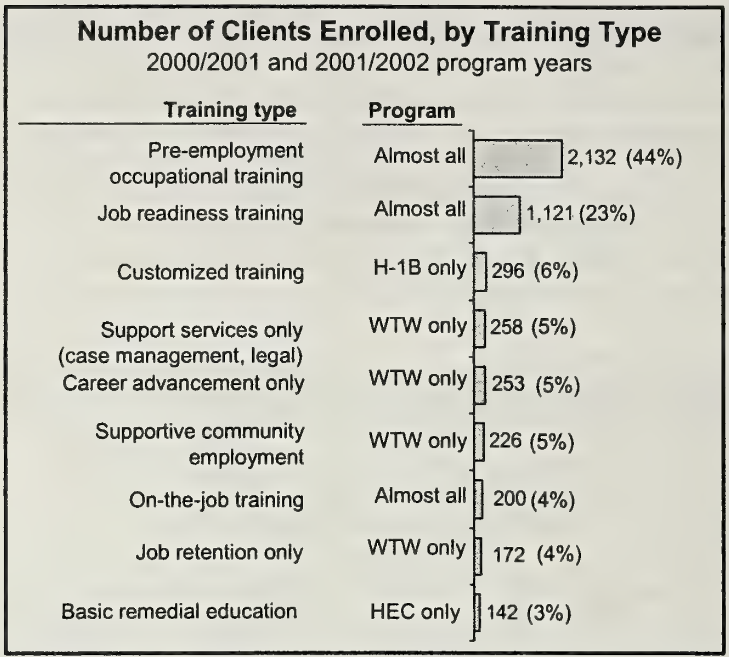


Refugee clients are younger workers primarily from the former Soviet Union and Eastern Europe. Most clients are well educated in their native country, but possess limited English ability.

Dislocated Workers are mostly middle-aged, Asian-American females. Because of their recent attachment to the labor force, almost all are receiving Unemployment Insurance, but no other public assistance. A lack of basic or English skills is their primary employment challenge.

Caregiver Training Initiative clients are almost exclusively female, and most are either Asian or Hispanic. Most have their HS diploma or GED prior to enrolling in the program. A lack of basic or English skills and single parenthood are their most significant employment challenges.

H-1B Technical Training clients are primarily white and Hispanic males, almost all of which possess at least a HS diploma. A lack of basic skills and disability are their most significant employment challenges.



Number of Clients Enrolled, by Training Type
2000/2001 and 2001/2002 program years

Several different training methods are used to develop workers' skills and facilitate employment entry, retention, and career advancement. Pre-employment occupational classroom training is far-and-away the most common type of training, utilized by almost all programs and accounting for 44% of all enrollments. General job readiness training and placement – not geared towards a specific occupation – accounts for nearly one quarter of enrollments. The HEC and Refugee programs, in particular, rely heavily on job readiness training, likely because helping homeless and refugee clients overcome significant life and language challenges may trump the need to acquire specific occupational skills. Both pre-employment occupational classroom training and job readiness training tend to include job placement and at least 90-day follow-up services with the training.

On-the-job training is also offered through the WIA-Adult, HEC, and CTI programs. Other types of training methods and employment services are more rare, but each fill a specific need. Customized IT training through the H-1B program ensures that training content reflects specific employer skill demands. The Welfare-to-Work program offers case management, legal assistance, supportive employment, job retention, and career advancement for current and former CalWorks and GA clients. In addition to the basic skills remediation that is incorporated in many training programs, HEC also offers a comprehensive, stand-alone basic skills training program, reaching about 3% of all WISF clients.

The great majority of services are funded through cost-reimbursement subcontracts to serve a group of clients of a predetermined size. Contractors are entirely responsible for recruiting participants into their program and receive funding on the basis of costs they incur providing services to clients. In contrast, individual referral (IR) contracts do not dictate a specific number of clients to be served – contractors are reimbursed for every individual client that they serve. Independent referral contracts generally enable greater client choice between various types of training services, a valuable mechanism for serving clients with diverse interests and training needs. On the other hand, clients served through group contracts may be more likely to benefit from the peer support of their program cohort. Group contracts also enable longer-term program planning by providing more financial stability to programs. Overall, IRs account for only 17% of all enrollments. The Dislocated Worker program is administered entirely through IR contracts, as is 18% of the WTW and 9% of the Refugee programs.

Programs administered through **Group Contracts**	Programs administered through **Individual Referral Contracts**
• Welfare-to-Work (82% of clients) • HEC (all clients) • WIA-Adult (all clients) • Refugee (91% of clients) • Caregiver Training Initiative (all clients) • H-1B Technical Training (all clients)	• Dislocated Worker (all clients) • Welfare-to-Work (18% of clients) • Refugee (9% of clients)
83% of total	17% of total

PART III: IMMEDIATE PROGRAM OUTCOMES

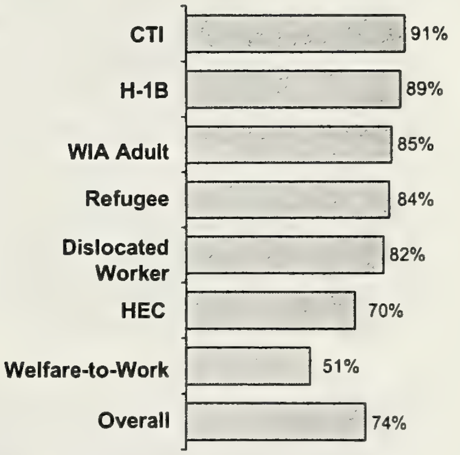
This section examines the success of WISF training programs along three dimensions: training completion, employment entry, and job quality. These outcome measures are among the most basic for employment training programs and WISF should use the baseline performance established herein to track its performance across all of its programs over time. The effect of several factors – client population and training method, for instance – on program outcomes are also examined. Readers should interpret these findings with caution – *this initial assessment does not attempt to isolate the individual contribution of each factor to program outcomes*. Significant differences in work experience, skills, and challenges to employment underlie the observed outcome differences between programs and groups of clients. For instance, WTW and HEC clients generally face the most severe challenges to employment, a fact that is apparent in the completion and employment entry rates of these two programs. Further analysis needs to be done to better understand the root causes of the outcome differences presented below. Nonetheless, this initial analysis does suggest several opportunities for program improvement.

How many clients complete their training?

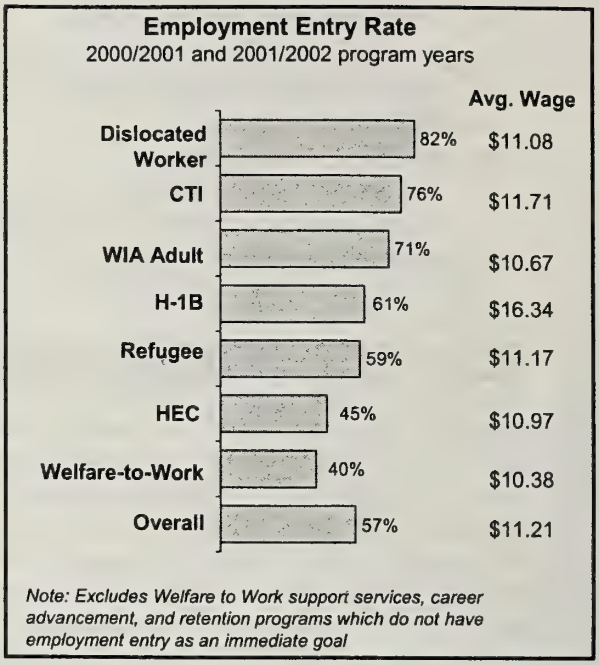
Program completion is perhaps the most basic of any training performance measure. For many clients, completing a structured training program is the first difficult step towards achieving their employment goals.

Approximately *74% of all WISF clients complete their training programs,* though some variation does exist across programs. Perhaps due to highly engaging content and explicit connection to career paths, the CTI and H1-B programs have the highest rates of completion –around 90%. Welfare-to-Work and HEC clients generally have a more difficult time successfully completing their training, with rates at 51% and 70%, respectively. WIA Adult, Dislocated Worker, and Refugee programs are generally more successful, with completion rates above 80%.

Successful Program Completion Rate
2000/2001 and 2001/2002 program years



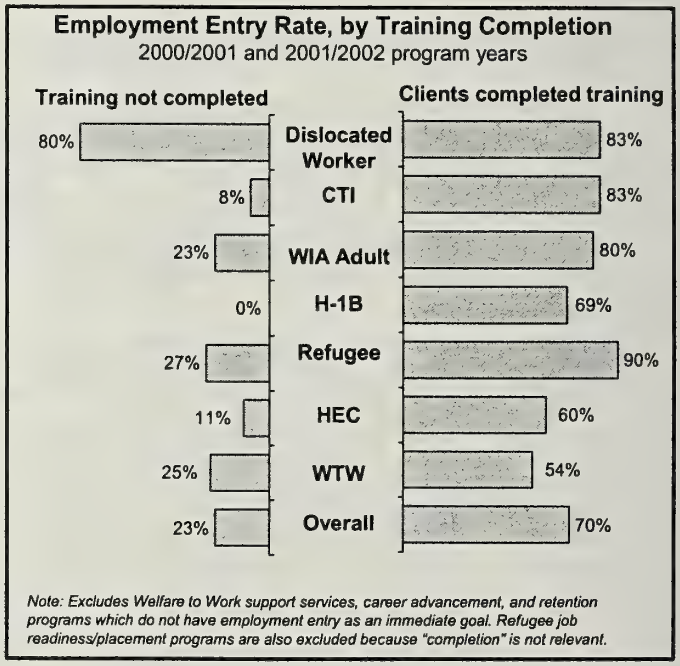
There does not appear to be any one successful training model for encouraging high completion rates. HEC clients participating in OJT training have high rates of successful completion, while job readiness training has the highest completion rate among WIA-Adult clients.



Note: Excludes Welfare to Work support services, career advancement, and retention programs which do not have employment entry as an immediate goal

How many clients enter employment after leaving WISF training?

Helping clients obtain unsubsidized private-sector employment is probably the single most important goal of San Francisco's workforce development efforts. Among clients who have exited WISF training programs in the past two years, *57% (a total of 1,669) found employment with an average wage of $11.21 per hour.*[2] Dislocated workers had the highest employment entry rate (82%) among all programs, likely reflecting their greater experience and labor force attachment. The CTI and WIA-Adult programs also registered above-average employment entry rates of 76% and 71%, respectively. Likely due to the drop in demand for IT services, the H-1B program has struggled with placing clients, but has managed to maintain high wages for those fortunate enough to find a job. The clients served by the Refugee, HEC, and Welfare-to-Work programs tend to have more severe employment barriers and are thus less likely to find employment after training.



Note: Excludes Welfare to Work support services, career advancement, and retention programs which do not have employment entry as an immediate goal. Refugee job readiness/placement programs are also excluded because "completion" is not relevant.

What factors seem to influence employment entry?

Completing training appears to be a significant first step towards finding employment – *employment entry rates are significantly higher for completers than for non-completers.* While some clients may leave training in order to take jobs – certainly a positive outcome – this practice is not the norm. For example, WIA-Adult clients who complete their training are more than three times as likely to enter employment as those that do not. For HEC, the ratio is 6-to-1. For CTI, ten-to-one. It is worth noting that dislocated workers enrolled in training, who are more attached to the labor market, are just as likely to enter employment regardless of whether or not they complete their training. Admittedly, the system's inability to track individuals that leave training may underestimate the employment rates of program dropouts. However, much of the discrepancy is likely explained by real factors such as the differential access to job development support that program completers receive relative to dropouts.

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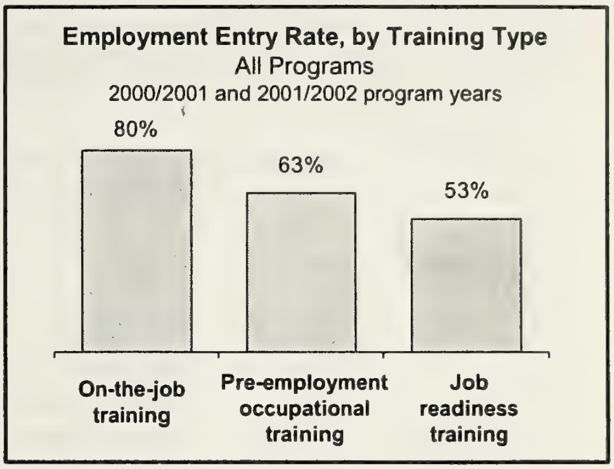
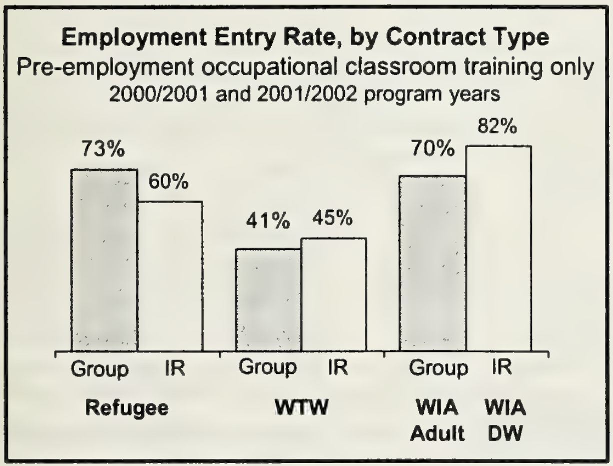
[2] This analysis of employment entry excludes Refugee Acculturation, WTW Support Services (VESL Immersion Program, legal aid), WTW Career Advancement, and WTW Job Retention programs because these programs do not have employment placement as a primary goal. The income gains and skills attainment associated with participation in these programs is not examined in this report.

On-the-Job training – where employment is arranged before training even begins – is the most successful method for getting people into jobs. Across every program that utilizes it, *OJT has the highest rate of employment entry – 80% overall.* Among pre-employment training programs, training for a specific occupation tends to have a higher employment entry rate than general job readiness training and placement programs, which tend to serve clients with more challenges to employment. Occupation-specific programs also allow job-seekers to more easily market their occupation-specific skills to employers.[3] Both job readiness and occupation-specific programs are necessary to serve the diverse needs of WISF clients.


Employment Entry Rate, by Training Type
All Programs
2000/2001 and 2001/2002 program years


Employment Entry Rate, by Contract Type
Pre-employment occupational classroom training only
2000/2001 and 2001/2002 program years

The relative value of client choice (enabled by individual referral contracts) vs. the "cohort effect" and financial stability enabled by group subcontracts has also been debated. *There is not compelling evidence that either contract type has consistently better performance than the other.* For pre-employment occupational training, Refugee group contracts faired better than individual referrals, whereas the opposite was true for dislocated workers (IRs) and WIA-Adult (group) clients. The employment entry rate of WTW clients was similar for group and individual contracts.

Several demographic and personal characteristics also seem to be strongly associated with the likelihood that a client will enter employment after training. Across all programs, race appears to be strongly associated with the likelihood of exiting for employment, while age and education do not. Asian clients consistently have higher than average employment entry rates, while African Americans' rates are consistently lower. Receipt of most types of public assistance is also generally associated with lower employment rates. Readers should note that these outcome differences likely reflect underlying differences in the work experience, skills, and challenges faced by clients with these observable characteristics. For instance, clients receiving Unemployment Insurance do have higher employment rates, likely due to their stronger attachment to the labor force. Disabled, homeless, and pregnant teenage clients had significantly lower employment rates than average. Surprisingly, clients with limited English skills or basic skills deficiencies actually had higher employment rates than average across several programs. Again, this may be partially explained by the correlation between limited English skills and other, positive, traits that were not controlled for.

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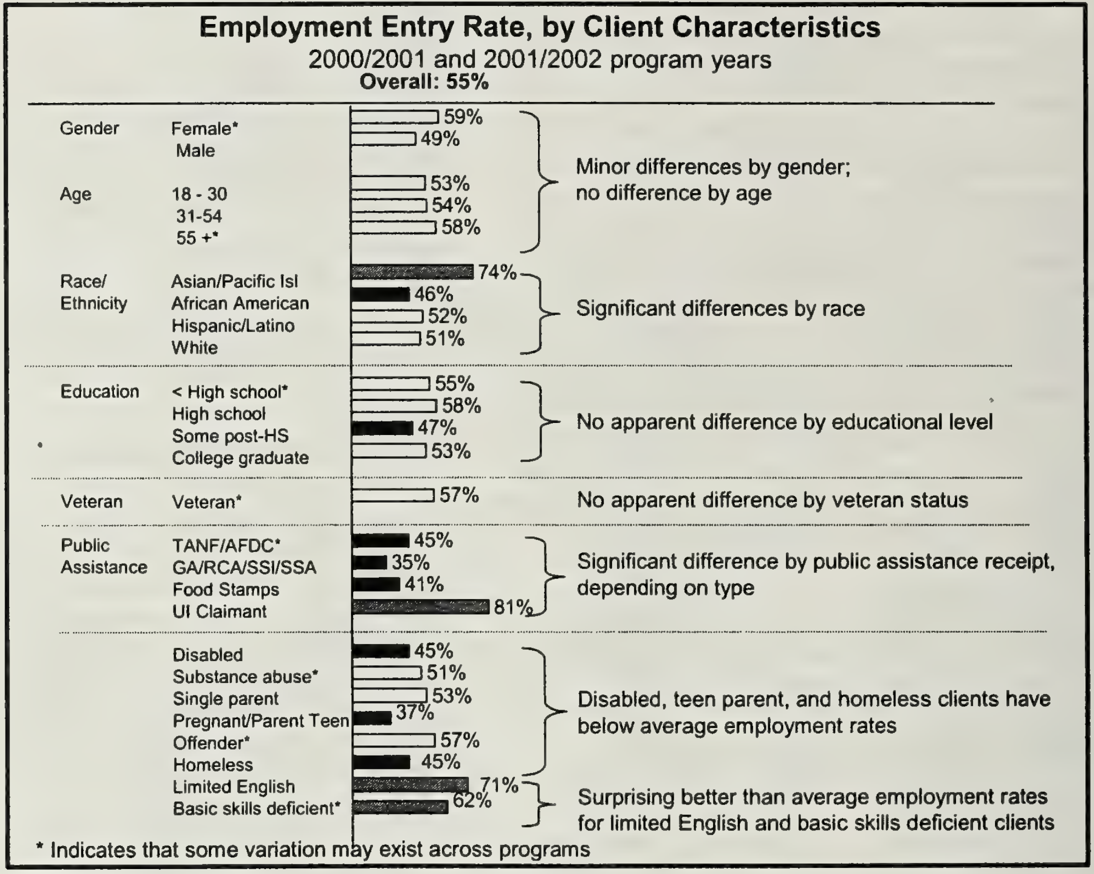
[3] The other training methods are limited to only one program, thus their performance cannot be interpreted as reflecting the performance of that method generally. Customized training, for example, is only conducted through the H-1B Technical Training program, so the merits of customized training generally cannot be distinguished from that of the H-1B program specifically.


Employment Entry Rate, by Client Characteristics
2000/2001 and 2001/2002 program years
Overall: 55%

* Indicates that some variation may exist across programs

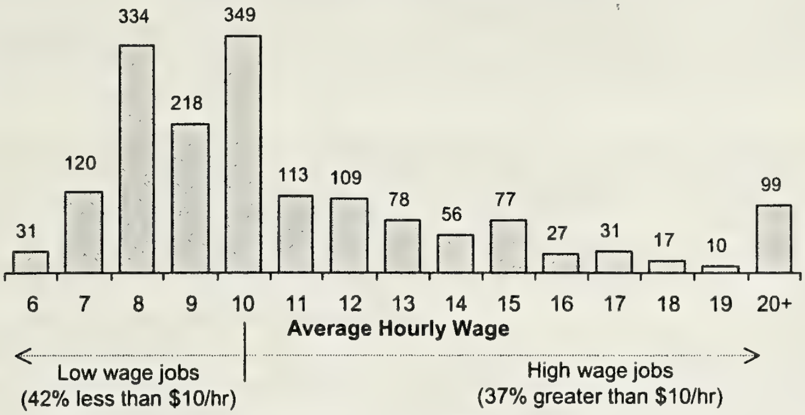
What types of jobs do clients get? What factors influence job quality?

While finding a job, any job – particularly after a long time away from the workplace – is certainly a significant step towards self-sufficiency for many WISF clients, employment alone is not enough. Good jobs pay a decent wage, provide enough work to earn a living, and support life's other expenses such as health and child care. "Job quality," which refers to the presence of these attributes, is a third objective of all employment and training programs. Across all programs, the jobs obtained by WISF-trained clients had an average wage of $11.21 per hour, almost 60% were full-time (35 hours per week) and nearly half provided health benefits.

Across the board averages mask the range of job quality experienced by former WISF clients. While the most common wage paid was $10 per hour (which is also the median), quite a few jobs paid significantly above or below this amount. In fact, 42% paid less than $10 per hour, while 37% paid more, with many at the extreme ends of this spectrum. A key challenge for WISF is to determine why clients find jobs at both ends of the wage spectrum and help more clients find jobs at the higher end.

Number of Job Placements at Each Wage Level

2000/2001 and 2001/2002 program years



The immediate reason for low-wage placements is that clients are entering occupations that intrinsically pay low wages. Seven of the ten most frequent occupations that clients enter after training pay less than $10 per hour, with housekeeping positions being the most common jobs that clients obtain, but also the least paid, the most likely to be part-time, and the most likely to lack health benefits. General office clerks, home health aids, nursing assistants, and security guards round out the top 5 occupations.

The variety of jobs clients enter reflects the combination of clients' wide range of employability, their varying interests, the diversity of training and employment services provided to them, and the economic realities of entry-level and lower-skilled opportunities available in San Francisco.

Number of Job Placements and Job Quality, by Occupation

2000/2001 and 2001/2002 program years

	Number of job placements	Avg. wage	% FT	% with health
Maids, housekeepers	165	$8.64	11%	12%
General office clerks	110	$11.16	60%	50%
Home health aids	103	$9.42	27%	53%
Nursing aids	96	$11.15	64%	58%
Security guards	73	$9.79	60%	53%
Web designers	59	$16.93	39%	27%
Maintenance workers	55	$8.72	35%	20%
Janitors	45	$9.02	51%	56%
Food prep and serving	44	$8.94	64%	66%
Sales associate	38	$9.07	55%	53%
Receptionists	38	$11.27	74%	84%
Carpenters	38	$17.12	100%	49%
Laborers	35	$11.65	77%	49%
Drivers	34	$11.80	85%	68%
Counselor	33	$10.61	70%	79%
Medical assistant	30	$11.75	60%	79%
Cashiers	29	$7.90	41%	34%
TOTAL	**1,669 jobs**	**$11.21/hr**	**57%**	**49%**

For many clients – recent immigrants with limited English ability, young single parents with no previous work experience, and ex-offenders, for example – job opportunities may be severely limited. Few occupations do not require the language proficiency that intensive customer and colleague interaction necessitate. Most office jobs demand computer literacy and professional dress, attributes that are difficult to develop and maintain while homeless, as many clients are. Even most construction jobs demand basic math skills and often a high school diploma or GED. San Francisco, in particular, lacks many of the lower-skilled industrial jobs that have historically brought economic security to the country's most disadvantaged residents. In light of this economic reality, it is not surprising that WISF clients tend to enter the occupations that are most accessible given their particular barriers to employment. The short duration of most WISF training programs – dictated by limited funding and short funding cycles – also severely limits the range of occupations clients can be trained for.

In fact, WISF training programs are oriented towards many occupations that, though low wage, may provide the best opportunity for clients to enter the labor force quickly. This point is demonstrated by the fact that clients tend to find jobs in the field in which they are trained. Among clients for which "placement related to training" is both measured and a relevant concept, 78% of placements were in occupations related to the clients' training.[4] WISF provides housekeeping, home health care, nursing assistant, web designing, and clerical training, among others, and clients tend to enter these fields as a result. Clients appear to take jobs unrelated to training for two very different reasons: the unrelated job is more desirable than that trained for (e.g. other professional, general office clerks, data entry) or the client settles for an undesirable, unrelated job (sewing machine operators, retail sales, cashiers). Overall, the first reason is more common – clients who take jobs unrelated to their training tend to earn about $0.70 more than those who stick to their job of training – particularly dislocated workers. Approximately 65% of dislocated workers take jobs unrelated to their training.

Most Common Occupations Related and Unrelated to Training

2000/2001 and 2001/2002 program years

Related to Training (78% of total)	Avg. wage	Not Related to Training (22% of total)	Avg. wage
Maids, housekeepers	$8.45	Sewing machine ops	$7.01
Home health aids	$9.40	Other professional	$12.56
Nursing aids	$11.33	General office clerks	$13.32
Web designers	$17.03	Maids, housekeepers	$10.04
General office clerks	$11.30	Security guards	$10.80
Carpenters	$16.92	Sales associates	$8.64
Medical assistant	$11.64	Janitors	$10.62
Food prep and serving	$8.63	Cashiers	$7.91
Security guards	$9.60	Stock handler	$9.57
Other health care jobs	$9.23	Data entry	$11.00
Total all related	**$11.37**	**Total all unrelated**	**$12.04**

The fact that most clients take jobs related to their occupation of training implies that clients' initial selection of training occupation has a big impact on the occupation they enter and ultimately the wage they will receive. Training programs should be supported based on a careful assessment of occupational demand, expected growth and job quality, keeping the special characteristics of clients in mind. The availability of training in specific occupations may influence clients to pursue these desirable occupations. Office clerical and receptionist jobs, moderately skilled health care jobs (nursing aids and medical assistants), and carpentry and other trades jobs offer the most promise for higher wage employment.

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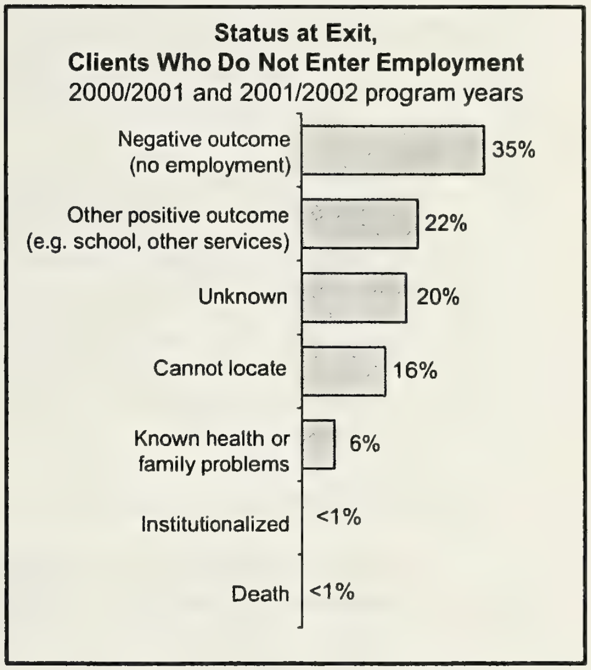
[4] Whether an occupation is related to training is not tracked for Welfare-to-Work services and is not relevant for all HEC and some Refugee clients because their training does not target one specific occupation. As a result, WTW, HEC, and some Refugee clients are not included in this analysis. Though training relation is self-reported by training providers, spot checks of the raw data suggested that reporting was generally accurate.

In order to utilize limited training resources effectively, WISF should also invest more in determining which clients actually need training services. The high incidence of dislocated workers taking unrelated jobs implies that many may be sufficiently served by intensive job development services, as opposed to costly training. Their relatively low level of training completion and the negligible impact completion has on employment entry supports this conclusion as well.

What happens to clients who do not enter employment immediately after training?

At least one-fifth of clients who do not immediately enter employment after training are deemed to have other positive, non-employment, outcomes. Clients may begin receipt of another type of service such as mental or physical health services, rehabilitation, or further education, which will hopefully increase their employability in the future. A much smaller fraction, less than 10%, does not enter employment due to some known health or family problem, including institutionalization and death. Unfortunately, the status of the vast majority of clients who exit without employment remains unknown. More than 70% of clients are simply exited from the program without a job, cannot be located, or their status cannot be determined at the point of exit.


Status at Exit,
Clients Who Do Not Enter Employment
2000/2001 and 2001/2002 program years

PART IV: Conclusion

Summary of Findings

- WISF trained more than 4,800 people over the past two years through its seven largest adult training programs. Trainees spanned the range of ages, races, experience, education, and unique challenges, the most common of which were lack of basic reading, writing, and math skills, limited English ability, single parenthood and homelessness.
- Pre-employment occupational classroom training, primarily through contracts to serve groups of clients, was the most common training type. Employer-oriented training such as On-the-Job (OJT) and customized training is still relatively rare.
- Overall, 74% of clients complete training, and nearly 60% enter employment for an average wage of $11.21 per hour. Of those that do find work, nearly 60% work full-time and about half receive health benefits.
  - Previous labor force attachment, completion of training, and the use of OJT appear to be associated with higher rates of entry into employment.
  - Disability, homelessness, teenage pregnancy, and public assistance recipiency are generally associated with lower rates of employment.
  - Age, education, and use of individual referral contracts do not appear to influence employment entry significantly.
- Occupational goals, as observed by training content, does appear to greatly influence the occupations clients enter and hence wage received: most clients enter jobs in housekeeping, office/clerical, health care, and IT following their training in those fields.
- Some dislocated workers who enroll in training may not actually need it – training completion appears to have no impact on the likelihood of these clients entering employment and many take better-paying jobs unrelated to their training.
- Little is known about clients who do not immediately enter employment after training.

Recommendations

- **Focus on helping clients build attachment to the labor force and successfully complete their training programs**, as these factors appear to be strongly associated with clients' success at finding a job following training. Such efforts may include internships while in training and adequate supports (e.g. case management, child care) during and following it.
- **Expand the use of on-the-job training and other employer-oriented training**. OJT nearly guarantees a job, provides valuable work experience, and connects clients with employers' usually substantial in-house training programs.
- **Choose occupations for training carefully based on demand, growth and job quality, keeping the special characteristics of clients in mind**. Office clerical and receptionist jobs, moderately skilled health care jobs (nursing aids and medical assistants), and carpentry and other trades offer the most promise for higher wage employment.
- **Pay more attention to determining which clients actually need costly training services**. Many dislocated workers may in fact be sufficiently served by intensive job development services.
- **Implement processes to track clients that do not enter employment immediately after training.**

PART V: Future Work

This report has examined a few of the most important performance measures for WISF-funded training programs, including program completion, employment entry, and job quality. Future work should focus on explaining these outcomes in greater detail, examining several other performance measures, and building the informational infrastructure that will enable this type of cross-program outcome assessment on an on-going basis.

The preceding analysis has not utilized the empirical methods necessary to reliably assign causality to any of the factors examined. To truly understand the relative impact of training method, specific client characteristics, and program completion on employment entry, for instance, statistical methods which allow one to control for each of these factors independently much be used.

Several other important performance measures were not examined in this report. Job retention, program re-enrollment, skills attainment, and earnings growth are currently tracked for many programs, and should also be examined through future work.

Lastly, additional database infrastructure needs to be developed in order to assess outcomes across programs on a regular basis. Program outcome data is currently dispersed among many independent databases, preventing cross-program synthesis and analysis. Constructing a centralized database that dynamically pulls outcome data from each independent database would greatly ease this type of research in the future.

Table A-1: Characteristics of Clients Served, by Program

Fraction of Clients in Program with Characteristic

	WTW	WIA Adult	WIA D.W.	H-1B	CTI	Refugee	HEC	TOTAL
Total enrolled and served								
Total enrolled and served	1,742	594	447	292	334	489	936	**4,834**
% of Total Enrollment	36%	12%	9%	6%	7%	10%	19%	**100%**
Gender								
Female	64%	56%	81%	42%	90%	56%	29%	**57%**
Male (incl trans)	36%	44%	19%	58%	10%	44%	71%	**43%**
Age at Enrollment								
Less than 18	0%	1%	0%	0%	1%	0%	0%	**0%**
18 through 30	30%	27%	7%	28%	25%	37%	18%	**25%**
31 through 54	68%	53%	80%	66%	61%	52%	68%	**65%**
55 through 64	3%	18%	12%	5%	12%	12%	14%	**9%**
65 and over	0%	2%	2%	0%	1%	0%	0%	**0%**
Race and Ethnicity								
American Indian/AK Native	1%	1%	0%	1%	0%	0%	2%	**1%**
Asian, Pacific Isl, Mid Eastern	17%	34%	71%	18%	50%	7%	5%	**23%**
Black, African American	46%	27%	3%	14%	16%	2%	49%	**32%**
Hispanic or Latino	11%	28%	9%	20%	23%	0%	18%	**14%**
White	25%	11%	17%	48%	12%	81%	22%	**28%**
Other	0%	0%	0%	0%	0%	11%	3%	**2%**
Receiving Public Assistance at Enrollment								
TANF and AFDC	60%	5%	0%	2%	10%	n/a	4%	**26%**
GA/RCA/SSI/SSA	25%	14%	0%	13%	6%	n/a	25%	**19%**
Food Stamps	41%	16%	1%	14%	12%	n/a	11%	**23%**
UI Claimant	n/a	17%	97%	20%	23%	n/a	5%	**27%**
Educational Attainment at Enrollment								
Less than HS	48%	33%	42%	4%	21%	10%	29%	**34%**
HS graduate or GED	34%	57%	52%	72%	62%	20%	45%	**43%**
Some post-HS	14%	10%	6%	24%	16%	20%	18%	**15%**
College graduate	5%	2%	4%	12%	4%	50%	8%	**10%**
Other Characteristics								
Veteran	n/a	4%	0%	4%	1%	n/a	15%	**7%**
Disabled	8%	8%	0%	18%	4%	n/a	58%	**18%**
Substance Abuse	13%	n/a	n/a	n/a	n/a	n/a	38%	**22%**
Limited English	30%	34%	67%	1%	29%	100%	n/a	**33%**
Single Parent	46%	23%	8%	4%	28%	n/a	n/a	**32%**
Displaced homemaker	4%	0%	0%	0%	0%	n/a	n/a	**2%**
Offender	18%	17%	0%	6%	2%	n/a	22%	**15%**
Homeless	13%	10%	0%	7%	1%	n/a	100%	**29%**
Teen Parent	13%	2%	0%	0%	1%	n/a	0%	**7%**
Basic Skills Deficient	26%	82%	94%	25%	42%	n/a	15%	**40%**

Note: Fraction of total client population that possesses a given characteristics is calculated over the base of programs for which that characteristic is measured.

Consent Calendar

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 5, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: ALLOCATION OF WIA TITLE IB (FORMULA) AND TITLE ID (YOUTH OPPORTUNITY GRANT) FUNDS AND SOLICITATION SPECIFICATIONS AND SELECTION CRITERIA FOR CONSULTING SERVICES TO FACILITATE YOUTH COUNCIL STRATEGIC PLANNING (AGENDA ITEM 5A)

BACKGROUND

The complex array of youth services in San Francisco lacks coordination, and as such, leaves many youth under served. A more comprehensive system of youth services can best be built with a full knowledge of all existing and planned youth services, programs and financial resources. This information, when viewed in the context of a needs analysis and vision for youth in our community, will better inform the strategic decisions of the Youth Council and other policy groups. As a result, funding decisions will also be more fully informed and targeted to fill service gaps, minimize duplication and support collaborations and partnerships that build on organizational strength and provide a more effective continuum of care.

The Youth Council recently began a process to develop a strategic plan to align youth resources, establish program standards, guide the investment of WIA funds and assist in the development of additional resources that address unmet needs. The planning process began with a half-day retreat on October 24, 2002, that was guided by J.D. Hoye and funded by DCYF. The process continues with a series of presentations focused on youth needs and will include a presentation on the results of a youth resource mapping effort. The process envisions one or more additional retreats to compare needs and resources, examine an analysis of service gaps and develop a strategic plan.

On January 23, 2003, the Youth Council adopted a staff recommendation that an appropriate combination of WIA IB (formula) and WIA ID (YOG) funds, in an amount not to exceed $15,000, be committed to the retention of a consultant to assist the Youth Council in its effort to develop a strategic plan for youth services and that staff be authorized to undertake the necessary and appropriate procurement and contracting processes to retain a qualified consultant.

Much of the discussion related to this item centered on the need for continuity and integration with other youth-related community planning efforts including the on-going Youth Allies Dialogue, School to Career strategic planning and San Francisco Unified School District system reform planning.

DISCUSSION

To best accomplish this lengthy planning effort and provide continuity with the Youth Allies Dialogue, the School to Career Partnership and other relevant youth planning efforts, a consultant may be necessary to facilitate Youth Council retreats, assist in gap analysis, advise plan implementation, develop program standards, build support of Youth Allies, and design sustainability strategy for Youth Opportunity and other youth programs as appropriate.

The Youth Council was advised that such procurement requires solicitation design and selection criteria approval of the Youth Council and ratification of the Workforce Investment San Francisco Board or Executive Committee. Given the amount set aside in the January 23, 2003 Youth Council action, PIC procurement procedures require three documented quotes for the services to be provided.

RECOMMENDATION

The Executive Committee recommends that an appropriate combination of WIA IB (formula) and WIA ID (YOG) funds, in an amount not to exceed $15,000, be committed to the retention of a consultant for the purposes outlined above and that staff be authorized to undertake the necessary and appropriate procurement and contracting processes to retain a qualified consultant.

The Executive Committee also recommends that quotes be obtained from no less than three consultants and that information be obtained in the areas listed below with responses scored with the weighting shown to determine the qualifications and appropriateness of applicants.

CRITERIA	WEIGHT
Knowledge of Federal Youth Policy • Describe your experience with WIA Title IB, ID, School to Career, Carl Perkins, and other federal program policy as it relates to local planning	20 Points
Experience with community-wide strategic planning • Describe your experience with the facilitation of local policy boards in the development of a comprehensive strategy for youth services	30 Points
Experience with San Francisco community youth planning efforts Describe your experience with the following: • Youth Allies Dialogue • School to Career Partnership Planning • SFUSD System Reform Planning • Other contemporary youth services planning	40 Points
Fees • Provide your hourly and daily fees structure	10 Points

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 5, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: ALLOCATION OF WIA TITLE IB (FORMULA) AND TITLE ID (YOUTH OPPORTUNITY GRANT) FUNDS TO SUPPORT A COMMUNITY-WIDE YOUTH SERVICE PROVIDERS CONFERENCE (AGENDA ITEM 5B)

BACKGROUND

A community–wide Youth Allies Dialogue was initiated by the Department of Children, Youth and their Families (DCYF) to better understand the resources available for youth in San Francisco, gain support for the resource mapping project and provide a forum for youth service providers to express concerns and exchange ideas. Much of the discussion within the Allies Dialogue process related to the need for and potential benefits of a youth employment conference targeted to San Francisco's youth provider organizations. A subcommittee of the Allies Dialogue was formed to further explore the idea and develop a framework for such a conference to:

- Generate greater public recognition of the importance of youth development
- Discuss issues of common concern
- Facilitate networking and increase the awareness of one another's services
- Exchange information for 'best practices'
- Share perspectives on the role of the Youth Council in developing a strategic plan
- Introduce concepts of program standards
- Hear from national experts on youth development and employment
- Strengthen connections with and involvement of the business community

As an initial step, the committee is seeking financial sponsorship to support the cost of the conference. DCYF has already set aside funds to sponsor the event and significant private sector support is being sought.

A draft Youth Employment Conference Proposal is attached that outlines more specifically the purpose, budget and timeline.

RECOMMENDATION

The Executive Committee recommends that an appropriate combination of WIA IB (formula) and WIA ID (YOG) funds in an amount not to exceed $7500 be dedicated to a San Francisco Youth Providers Conference and that staff be authorized to undertake the necessary and appropriate procurement and contracting processes to ensure successful sponsorship of the event.

Attachment

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YOUTH EMPLOYMENT CONFERENCE PROPOSAL

The San Francisco Youth Employment Coordination Project submits this request for funding for $7500 to the Private Industry Council of San Francisco to support the planning and implementation of a Youth Employment Conference to be held in May 2003. The request for this conference has come from service providers participating over the past 18 months in Allies Dialogues, forums hosted by the Department of Children, Youth & Their Families, which bring together San Francisco's youth employment programs and other programs/organizations that have a stake in youth development and employment training.

The goals of the Youth Employment Conference would be to:

- Provide opportunities for networking and sharing information among youth employment service agencies and providers
- Provide opportunities for staff training, professional development and sharing of best practices
- Increase the visibility of youth employment service needs/programs
- Strengthen our connections with the business community and broaden employment opportunities for our youth
- Mobilize and strengthen the community of youth employment service providers
- Define the policy agenda and future commitment to youth employment.
- Provide vision, inspiration and direction for youth employment services

The Youth Employment Conference will bring together youth employment service providers, employers, current and prospective funders of services, school personnel, public sector partners and young people in sharing information, resources and dialogue about the status of youth employment services in San Francisco. The conference would include workshops, policy discussions, presentations, a morning plenary and a luncheon awards ceremony recognizing business and community leaders for their support of youth employment

Budget and Staffing

A Conference committee consisting of representatives of community organizations, staff from the Private Industry Council and the Youth Employment Coordination Project has been formed. This committee is committed will be responsible for the planning, development and implementation of the conference. The Conference Coordinator will provide project management, coordination and oversight, working in partnership with the Planning Committee and Conference sponsors and funders. Administrative Support staff will assist in developing and disseminating outreach materials and coordinating conference logistics. Funds will also be used to provide youth stipends to pay young people who will assist in staffing the conference.

A projected budget of $25,000 has been developed with additional funding being sought from the Department of Children, Youth & Their Families and Private Sector sources.

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INCOME	
Department of Children, Youth & Their Families	$10,000 (confirmed)
Private Industry Council of SF	$7500
Private Support (Foundation and Corporate)	$7500

EXPENSES	COST
Facility/Food	**12,000**
(Based on an estimate of 300 participants at $40 per participant)	
Staffing	**8,000**
Project Coordinator (100 hours @ $50/hour)	
Administrative Support (40 hours @25/hour)	
Youth Stipends (100 hours @ $10/hour)	
Materials	**3,000**
Mailing	**1,400**
TOTAL PROJECTED BUDGET	$25,000

Timeline

The conference planning committee timeline for preparing for the conference includes the following:

January

- Secure Conference Funding
- Identify Staff
- Secure sponsors
- Identify conference format and schedule
- Develop outreach materials ("Save the Date" and Request for Presentations)
- Develop Mailing List and Send Request for Presentations

February

- Secure Facility
- Select workshop presenters
- Confirm keynote speakers
- Develop Conference Agenda

March/April

- Identify and Notify Workshop Presenters
- Send 2nd Conference Announcement
- Confirm Participants and Agency Information Tables
- Finalize Arrangements

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The Youth Employment Coordination Project

The Youth Employment Coordination Project is a collaborative effort of the Department of Children Youth & Their Families, the San Francisco Unified School District, the Private Industry Council of San Francisco, San Francisco School to Career Partnership, and the Every Child Can Learn Foundation. These partners are currently implementing a Youth Employment Resource Mapping Project to gather data on available work-based learning and career development opportunities for youth in San Francisco. This data will be used to inform funders and policy makers to begin coordinated planning across funding streams and institutions, better align funding to address need and gap areas, generate additional resources to address community need, and lay the foundation for efforts to improve both the quantity and quality of work-based activities for youth.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 12, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PROPOSED PROGRAM DESIGN FOR THE PY'03 DISLOCATED WORKER FORMULA ALLOCATION, WORKFORCE INVESTMENT ACT (Agenda Item 5C)

The Workforce Investment San Francisco (WISF) Board is asked to approve a proposed program design for effective investment of Workforce Investment Act (WIA) Dislocated Worker formula-allocated funds for the program year beginning July 1, 2003. Funding amounts to local areas have not been announced by the State.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

Background

The Workforce Investment Act directs three allocations of funds through the States to local areas. These allocations will create programs (or service delivery systems) for **adults, dislocated workers, and youths**. Each has its own eligibilities, data collection requirements, and performance measures. What all three programs have in common is initial assessment, the preparation of individual employment plans, and customer choice from among appropriate available services.

WIA defines a **Dislocated worker** as an individual who —

"(A) (i) has been terminated or laid off, or who has received a notice of termination or layoff, from employment;
(ii) (I) is eligible for or has exhausted entitlement to unemployment compensation; or
(II) has been employed for a duration sufficient to demonstrate, to the appropriate entity at a One Stop center referred to in section 134(c), attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; and
(iii) is unlikely to return to a previous industry or occupation;
(B) (i) has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise;
(ii) is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days; or
(iii) for purposes of eligibility to receive services other than training services described in section 134(d)(4), intensive services described in section 134(d)(3),

or supportive services, is employed at a facility at which the employer has made a general announcement that such facility will close;

(C) was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters; or

(D) is a displaced homemaker."

Funding

For **dislocated worker** programs the Act sends State grant funds to the local level under a formula determined by the Governor and based on unemployment, plant closings and mass layoff data.

The State may reserve funds for Statewide activities, including the provision of **Rapid Response** funds to local areas for major layoffs and plant closings. There are no minimum or maximum levels for dislocated worker funds.

Dislocated Worker Program Performance Measures

a. Entry into unsubsidized employment;
b. Retention in unsubsidized employment six months after entry into the employment;
c. Earnings received in unsubsidized employment six months after entry into the employment relative to earnings of job of dislocation; and
d. Attainment of a recognized credential relating to achievement of educational skills, which may include attainment of a secondary school diploma or its recognized equivalent, or occupational skills, by participants who enter unsubsidized employment, or by participants who are eligible youth age 19 through 21 who enter postsecondary education, advanced training, or unsubsidized employment.

Dislocated Worker Program Design Recommendations

Dislocated worker retraining activities are generally driven by responses to Worker Adjustment Retraining Notices (WARN). Early, on-site intervention is delivered as a team effort by the PIC, City College, EDD, organized labor, and others as needed by the workers affected. Other post-layoff workers obtain individualized services by attending One Stop center presentations.

WIA dislocated worker funds should provide for Individual Referrals (IRs) to ETPL-certified training agencies. Funding may be set aside for OJT employer reimbursement and participant support (e.g., childcare and transportation). If not separately financed by the State, it may be necessary to set aside local funds for Rapid Response services.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 12, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PROPOSED PROGRAM DESIGN FOR THE PY'03 ADULT FORMULA ALLOCATION, WORKFORCE INVESTMENT ACT (Agenda Item 5C)

The Workforce Investment San Francisco (WISF) Board is asked to approve a proposed program design for effective investment of Workforce Investment Act (WIA) Adult formula-allocated funds for the program year beginning July 1, 2003. The Board is asked to target the Adult program in terms of:

- which San Franciscans should be served —
    - by family income level,
    - by barriers to employment; and
- how they should be served —
    - by training method or technology,
    - by placement in occupations within industry sectors that provide the greatest economic benefit to the City's economy.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

To prepare for these strategic decisions, the PRC authorized a workgroup to recommend a proposal for the best use of the estimated $1.8 million expected. The following recommendations, put forth by PIC Staff and modified by the PRC, represent a consensus of the workgroup, informed by research into the nature of community need for job training, the capacities of public and private job training agencies, and the labor market needs of the City.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

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I. BACKGROUND

The Workforce Investment Act created a national network of business-led workforce investment boards and combined public sector partners into One Stop systems to meet the needs of job seekers and businesses. WIA allocations are distributed to states and locales by complex, Census-based formula which account for relative levels of unemployment and poverty.

The design of the WIA **Adult** program embodies important strategic decisions about San Francisco's workforce investment system. While this $1.8 million dollar program is only a fraction of the investment made in the City's workforce, it sets strong precedent for how locally-controlled taxpayer dollars should be used.

The Act requires —

- establishment of a **One Stop delivery system** and related electronic systems supported by Mandatory Partners and funding streams that offer a full range of services. A dozen federally-funded programs are required to make **Core** services available through One Stops, through which any citizen may look for a job, explore work preparation and career development services, and access a range of employment, training, adult and occupational education programs.

- establishment of a State **Eligible Training Providers List** (ETPL), for customer choice in quality services through use of this catalog of off-the-shelf training programs from which an individual may choose. Under WIA, any training agency desiring to accept a WIA contract must be listed on the State's ETPL.

The Workforce Investment Act directs three allocations of funds (adult, dislocated worker, and youth) through the State Governors to local areas. These allocations create service delivery systems, each with its own eligibilities, data collection requirements, and performance measures. What all three programs have in common is initial assessment, the preparation of individual employment plans, and customer choice from among appropriate available services.

A. WIA Design Elements

WIA introduced three levels of services to job seekers — **core, intensive, and training** — all made available through a One Stop delivery system.

Core services are intended as a community resource that *anyone* can use throughout their lifetime to enhance their job skills. By integrating the services offered through multiple partner programs and using available technology, the One Stop system offers customers — job seekers and employers — a choice of any or all core services and information.

***Core Services** include: Determination of eligibility for services; Outreach, intake (which may include worker profiling), and orientation to the One Stop system; Initial assessment; Job search and placement assistance, and career counseling; Provision of labor market information; Provision of information on: eligible training providers; local performance outcomes; One Stop activities; filing claims for Unemployment Insurance; supportive services; Assistance in establishing eligibility for Welfare-to-Work and other programs and financial aid assistance;*

Intensive services may be provided to adults and dislocated workers who are *unemployed* and are unable to obtain employment through core services. Adults who are *employed*, but who are determined by the One Stop Operator to be in need of intensive additional services in order to obtain or retain employment that allows for self-sufficiency, are eligible to receive intensive services.

***Intensive Services** include: Comprehensive and specialized assessments of skill levels (i.e., diagnostic testing); Development of an individual employment plan; Group counseling; Individual counseling and career planning; Case management; Short-term prevocational services; and Follow-up services.*

Training services are intended for individuals who are unable to obtain or retain employment through intensive services. Training services must be directly linked to occupations that are in demand in the local area. As with intensive services, in areas where the local board and the Governor determine that adult funds are limited, welfare recipients and other low-income individuals shall receive priority in the use of such funds for training services. "Priority" does not require sole, exclusive use of funds for this population.

***Training services** include: Basic skills training; occupational skills training; on-the-job training; customized training; programs that combine workplace training with related instruction, which may include cooperative education programs; private sector operated training programs; skill upgrading and retraining; entrepreneurial training; and customized training conducted with a commitment by an employer to employ an individual upon successful completion of the training.*

The underlying principle of the provision of training services under the Act is customer choice. One Stop systems will provide access to consumer information relating to training providers that can assist individuals in gaining relevant skills — including information on the performance of such providers in placing graduates in employment. Through local boards, each State will compile a list of eligible training providers that meet performance levels as set by the Governor, and adjusted upward, as appropriate, by local boards. Individuals may choose any provider from the list of approved providers. Training options are to be provided in an environment of quality career information and assistance to arrive at the best possible training choice.

The law does not prescribe a limit on the amount that may be provided to assist an individual in obtaining training, but does not preclude a State or locality from establishing such limits. Neither San Francisco nor the State of California has established such a limit to date.

B. GENERAL WIA TITLE I PROGRAM REQUIREMENTS (Excerpt from WIA Section 195)

1. Each program under this title shall provide employment and training opportunities to those who can benefit from, and who are most in need of, such opportunities. In addition, efforts shall be made to develop programs which contribute to occupational development, upward mobility, development of new careers, and opportunities for nontraditional employment.

2. Funds provided under this title shall only be used for activities that are in addition to those that would otherwise be available in the local area in the absence of such funds.

C. ELIGIBILITY

1. General Program Eligibility

Persons who are 18 years of age or older, have the right to work in the U.S., and, if male, have complied with military selective service requirements.

2. Training Services Eligibility

Funds allocated to a local area for adults shall be used to provide training services to adults --

a. who have met the eligibility requirements for intensive services and who are unable to obtain or retain employment through such services;
b. who after an interview, evaluation, or assessment, and case management, have been determined by a one-stop operator or one-stop partner, as appropriate, to be in need of training services and to have the skills and qualifications to successfully participate in the selected program of training services;
c. who select programs of training services that are directly linked to employment opportunities;
d. who are determined to be eligible in accordance with a priority system, if any, in effect;
e. who are unable to obtain other grant assistance for such services, including Federal Pell Grants or require assistance beyond the assistance made available under other grant assistance programs, including Federal Pell Grants.

II. ASSESSMENT OF NEED

The task of San Francisco's workforce development system is to develop the skills of San Francisco residents in order to simultaneously serve San Francisco employers, job seekers, and workers. A skilled labor force enables employers to maintain competitiveness and grow their business, while residents are able to use their new skills to enter, remain in, and advance in the workforce. As a starting point to developing a broad workforce development strategy, and the design of the WIA Adult program specifically, the workforce development needs of San Francisco's employers, job seekers, and incumbent workers are articulated below.

A. Workforce Needs of San Francisco's Employers

Workforce development needs arise from several factors: rapidly growing industries need a trained workforce to continue their expansion, firms with many job openings from high turnover may be finding it difficult to find and retain qualified workers, specific economic development initiatives may have specialized workforce needs that current systems are not designed to fill, and some industries, while not growing rapidly, may have severe labor shortages due to an aging or declining supply of specially trained workers. Lastly, changes in technology, organization, or production methods may leave employers' current workforce without the skills needed to succeed.

1. Workforce development needs to address long-term growth and turnover

Based on anticipated state-wide employment growth and past trends within San Francisco's industries, the California Employment Development Department projects that San Francisco employers will add an average of about 5,300 jobs every year for the next three years, a rate of just less than 1% annually. While growth is expected in most industries, business services firms (primarily computer services, temporary help agencies, and building maintenance), retail stores (particularly apparel stores), government, and restaurants will add the most jobs. Moderate job growth of 200 to 400 jobs per year is also expected in transportation, communication and utilities, engineering and management services, private education, finance and construction. *San Francisco's Labor Market: Employment Projections and Wages* contains employment projections by detailed industry.

Industry expansion fuels demand for specific occupations within these industries. As shown in Table 1, about 3,000 of projected new jobs (57%) will not require a four-year college degree. It is the demand for these occupations that the adult workforce development system – including training provided by community and for-profit schools and colleges, non-profit organizations, and labor unions – must fill. Non-college jobs fall generally into two categories. Nearly 2,000 (38%) new jobs will be very entry-level, requiring only general job readiness, basic skills remediation, English-as-a-Second Language, and short-term vocational training. Due to growth in their primary industries, many entry-level occupations such as retail sales clerks and cashiers, janitors, security guards, receptionists, and waiters will add numerous jobs in the next couple of years. Jobs that require more advanced training or experience – front-line supervisors, paralegals, cooks, nurses, and teacher aides for instance – will also be in demand, accounting for 20% of expected employment growth (1,000 jobs).

In addition to demand created by growth, turnover (both voluntary and involuntary) will also generate numerous job openings in the years to come, particularly among entry-level occupations. Entry-level retail, office, food service, and cleaning occupations will all register significant openings from turnover alone, magnifying the need arising from growth. Table 2 highlights the occupations with the most projected job openings at each education and experience level.

Table 1. Projected annual job growth by education and experience required

Typical education or experience needed	Projected annual job growth	Share of projected annual job growth
At least a 4-year college degree	**2,259**	**43%**
Professional degree	101	2%
Doctoral degree	143	3%
Master's degree	107	2%
Work experience plus a B.A.	410	8%
Bachelor's degree	1,497	28%
Less than a 4-year college degree	**3,013**	**57%**
Associate degree	294	6%
Post-secondary vocational education	-80	-2%
Work experience	413	8%
Long-term on-the-job training	470	9%
Medium-term on-the-job training	-69	-1%
Short-term on-the-job training	1,986	38%
All jobs	**5,271**	**100%**

Source: California Employment Development Department Occupation Employment Projections in San Francisco County, 1999 – 2006.

San Francisco's workforce development system must fill the needs of both of these types of occupations: entry-level employers need a large pool of workers with the basic skills, language ability, and positive attitude to succeed and advance, while employers of more skilled occupations need a pool of workers with specific skills training and experience.

Table 2: Projected annual job openings from growth and turnover, by occupation

Occupation	Projected annual job growth	Projected annual turnover	Total projected job openings
Associate degree			
Registered nurses	59	116	174
Other health care prof.	41	69	110
Paralegal personnel	83	19	101
Teacher aids	59	20	79
Post-secondary vocational education			
General secretaries	-87	213	126
Drafters	7	50	57
Legal secretaries	-9	63	54
Work experience			
Front-line clerical supvsr	91	227	319
Front-line sales supvsr	131	101	233
Other front-line service supvsr	60	86	146
Long-term on-the-job training			
Cooks-restaurant	59	146	204
Maintenance, repairers	33	100	133
Carpenters	33	89	121
Medium-term on-the-job training			
General sales workers	44	106	150
Bookkeeping clerks	-79	199	120
Business service sales clerks	41	53	94
Short-term on-the-job training			
Salespersons - retail	431	636	1,067
Waiters and waitresses	79	634	713
Cashiers	177	450	627
General office clerks	31	514	546
Combined food prep and service	43	391	434
Janitors/cleaners (except maids)	119	233	351
Food preparation workers	24	301	326
Guards and watch guards	96	154	250
Receptionists	87	157	244
Misc. helpers and laborers	4	237	241
Tellers	-27	231	204
Maids and housekeepers	46	114	160

2. **Workforce development needs arising from economic development activities**
   The workforce development needs described above are the result of the natural long-term growth of San Francisco's economy. These long-term projections, which are based on historical employment trends, may not reflect the needs arising from proactive economic development efforts to attract new businesses to San Francisco. For instance, the anticipated biotechnology research complex at Mission Bay will create many new jobs over the next several years and beyond. While the regional university system should supply the college-educated scientists, researchers, and managers needed at the complex, the local workforce development system will need to supply building cleaners, lab assistants, and other lower- to moderately-skilled workers to meet the expected expansion.

3. **Addressing recognized labor shortages**
   Even if not growing rapidly, industries can experience severe labor shortages if the number of new entrants to the industry does not keep pace with those exiting for retirement or other reasons. Nationally, the health care industry has experienced such a shortage – high retirement rates among nurses, the introduction of new medical technologies, and increased outpatient care have all increased the demand for health care professionals beyond the current supply. This shortage, nation-wide and in San Francisco, creates both an obligation and opportunity for San Francisco's workforce development system to address. The Hospital Council Workforce Taskforce identified an annual current shortage of 733 nurses, 114 LVNs, and 186 nursing assistants in San Francisco alone.

4. **Incumbent workforce skill upgrading**
   The skills of current workers, while sufficient in years past, may not be adequate to take full advantage of the opportunities that accompany the introduction of new technologies, production methods, and business practices. The broad workforce development system must continue to upgrade the skills of San Francisco's incumbent workforce to meet these needs, allowing businesses to grow and continue to remain competitive. The emergence of the Internet as a major business tool has been one such recent technological advancement that generated an enormous demand for incumbent workforce skill upgrading.

B. Training Needs of San Francisco Residents

Many San Francisco adults will need training and other employment services to be adequately prepared to enter the job openings described above. Before they are ready for even the most entry-level jobs, many residents may need basic skills remediation, ESL training, or general job preparation to enter the workplace, and possibly short-term vocational training in the occupation. More advanced jobs may require specific vocational training, both in the classroom and on the job.

1. **Lack of Basic and Language Skills and other Challenges to Employment**
   Over the past two years, a significant number of job seeking clients possessed one or more characteristics that could make even entry-level employment very difficult if not addressed. Approximately 40% of clients lack basic reading and math skills, possibly due to their inadequate secondary school education (34% lack a H.S. diploma or GED). An almost equal number speak limited or no English, greatly limiting their employment options in a service-oriented economy. Even if they

possessed adequate basic and language skills, homelessness, single parenthood, disability, substance abuse, a criminal record, or mental trauma from military service could continue to prevent many from realizing their employment potential. *San Francisco's Labor Market: Employment Projections and Wages* contains detailed characteristics of job seeking clients. Social interventions combined with workforce development efforts to prepare people to enter even the most entry-level jobs should help job seekers overcome these challenges.

2. Vocational skills for the unemployed and non-self sufficient

As described previously, many jobs require some level of vocation-specific training or experience to fill, beyond the basic skills needed for entry-level jobs. At the same time, many unemployed job-seekers or incumbent entry-level workers have adequate basic skills but not the specific vocational skills needed to obtain or advance to a moderately-skilled position. For many incumbent workers in entry-level jobs, career advancement to a more skilled occupation is the best (if not only) means to achieve a wage that pays enough live on without government support. Vocation-specific training combined with adequate supportive services (e.g. case management, career counseling, transportation, child care, job search) would address this need.

III. BROAD WORKFORCE DEVELOPMENT SYSTEM CONTEXT

Employment and training services funded under the WIA Adult program are but one component of the expansive adult workforce development system in San Francisco. For instance, WISF Board directly oversees several other programs that provide training and employment services to eligible San Francisco adults. More broadly, City College of San Francisco, labor organizations, for-profit schools, and almost all employers also provide formal training for hundreds of thousands of San Francisco residents annually. As one of the most flexible of the programs under the oversight of WISF Board, the WIA Adult program permits tremendous discretion over the use of its funds. WIA Adult funds can be used to fill identified holes in the broad workforce development system in order to meet the skills-upgrading needs of San Francisco employers and residents.

A. Current Adult Training Programs in San Francisco

Table 3 describes several of the major elements of San Francisco's current adult workforce development system. Also under the oversight of the Workforce Investment San Francisco Board are the Welfare-to-Work, the WIA Dislocated Worker, Homeless Employment Collaborative, Refugee, Caregiver Training Initiative, and H1-B Technical Training programs – all of which provide employment and training services to various categories of disadvantaged adults. On a larger scale, nearly 100,000 San Franciscans enroll in at least one course at City College of San Francisco every year and from 35% to 65% of all San Francisco workers receive formal training from their employers. While the aggregate magnitude of training provided by labor organizations is not known, it is believed to be substantial for union members, particularly in the construction trades.

Table 3: **Elements of San Francisco's Adult Workforce Development System**

Training opportunity for SF adults	**Typical population served**	**Type of training**	**Approximate # trained per year**
WISF Board Programs			
Welfare to Work	- TANF recipients - Single parents	- Various occupations - Career advancement	850
WIA – Dislocated Worker	- Unemployed, - Many limited English	- Various occupations	250 - 300
WIA – Adult	- TBD	- TBD	300
Homeless Employment Collaborative	- Homeless adults - Many are disabled	- General job readiness - On-the-job trng - Vocational - Basic remedial ed	500
Refugee Program	- Recent refugees & asylees	- ESL, VESL - General job readiness - Vocational training	200
Nurse Workforce Initiative	- Incumbent hospital workers - Foreign trained nurses	- Nursing occupations	18
H-1B Technical Training Program	- Low income adults - Slightly more educated	- IT (e.g. web, network) - General computer skills	300
Labor Organizations	- Union members	- Construction trades - Other occupations	Not available
City College of San Francisco	- All SF residents	- Various occupations - ESL, basic skills	~100,000
San Francisco Employers	- Moderate to highly-skilled and educated	- Mngt, prof, tech - General computer skills - Orientation, safety	~300,000

B. Identification of Training Gaps

In the context of the broader workforce development system, several areas stand out as potential training gaps that the WIA Adult program could fill. First, while other WISF programs provide training for specific categories of disadvantaged adults (TANF recipients, single parents, homeless, refugees), sometimes in specific occupations (e.g. Health Care, IT, and general computer use), these programs may not be sufficient to serve the entirety of disadvantaged adults with special challenges to employment. The workforce needs of San Francisco employers could be served by devoting resources to the preparation of these adults for many of the entry-level job openings that will result from industry growth, turnover, and economic development.

Secondly, low-income incumbent workers in entry-level jobs may be underserved by the current workforce development system. Though making a meager income, many low-wage workers may be ineligible for publicly-funded training programs, yet may also be excluded from training provided by their employer, which tends to focus on higher-skilled occupations. Many of these "working poor" adults and their employers would greatly benefit from vocation-specific or English language training that would enable them to advance to higher-skilled positions, but may have difficulty accessing other training. The higher wages that accompany more skilled occupations will bring the working poor closer to economic self-sufficiency while simultaneously providing the skilled workforce needed by San Francisco's growing economy.

IV. WIA PROGRAM DESIGN RECOMMENDATION

A. Performance Accountability System

The Act establishes core indicators of performance for all programs, typically calculated by using the State's Unemployment Insurance wage database. Measures specified in the Act for the **Adult** program are:

1. Entry into unsubsidized employment;
2. Retention in unsubsidized employment six months after entry into employment;
3. Earnings received in unsubsidized employment six months after entry into employment; and
4. Attainment of a recognized credential relating to achievement of educational skills, which may include attainment of a secondary school diploma or its recognized equivalent, or occupational skills, by participants who enter unsubsidized employment, or by participants who are eligible youth age 19 through 21 who enter postsecondary education, advanced training, or unsubsidized employment.

> *The core performance measures are the key measures of success in achieving the legislative goals of WIA…*
>
> *Source: Excerpt, DOL TEGL NO. 7-99, March 3, 2000*

B. Goals and Objectives for WIA Adult Program

	Local Performance Goals WIA Years			Not Met, Met or Exceeded?		
WIA Requirement at Section 136(c)	**1**	**2**	**3**	**1**	**2**	**3**
ADULTS						
Adult Entered Employment Rate	68.1%	66%	68%	Met	Exceed	(tbd)
Adult Employment Retention Rate	76.4%	78%	80%	Exceed	Exceed	(tbd)
Adult Earnings Change Rate	$3,551	$3,700	$3,800	Exceed	Exceed	(tbd)
Adult Employment & Credential Attainment Rate	40%	50%	60%	Not Met	Not Met	(tbd)

C. Recommended Uses of Local WIA Adult Funds

1. Broad Budget Priorities (also included in this meeting's agenda item #8A)[1]

- 85% of the PY 2003 WIA Adult funds available for intensive and training services are set aside to serve "special populations of low income adults with multiple barriers" through competitively procured cost reimbursement subcontracts.
- 5% of the PY 2003 WIA Adult funds available for intensive and training services are set aside to serve low income (as defined by the WIA) adults through individual referral subcontracts.
- 10% of the PY 2003 WIA Adult funds available for intensive and training services are set aside for individual referral subcontracts to serve adults whose incomes are between the low income level as defined by the WIA and 75% of the San Francisco Self-Sufficiency Standard.
- Expenditures will be closely monitored and funds transferred to services for low income adults if demand for intensive and training services by these individuals exceeds the planned 90% of funds.

2. Subcontracts to Serve Special Populations

a. Authority

One of the intentions of the WIA is that, generally, training services should be provided through the use of individual training accounts and be provided to eligible individuals through the one-stop delivery system. The exceptions to this are as follows: Training services may be provided pursuant to a contract for services in lieu of an individual training account if –

(1) such services are on-the-job training provided by an employer or customized training;
(2) the local board determines there are an insufficient number of eligible providers of training services in the local area involved (such as in a rural area) to accomplish the purposes of a system of individual training accounts; or
(3) the local board determines that there is a training services program of demonstrated effectiveness offered in the local area by a community-based organization or another private organization to serve special participant populations that face multiple barriers to employment.

San Francisco is home to a number of community-based vocational training programs of demonstrated effectiveness that serve special participant populations that face multiple barriers to employment.

The term "special participant population that faces multiple barriers to employment" is defined in WIA as a "population of low-income individuals that is included in one or more of the following categories:

- Individuals with substantial language or cultural barriers.
- Offenders.
- Homeless individuals.

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[1] The Employer Services Committee is recommending a policy framework for customized training and setting aside a minimum of $300,000 from multiple sources, which may include some WIA Adult funds. (Agenda Item #9A)

WIA defines “low income” as an individual who--

- receives, or is a member of a family that receives cash payments under a Federal, State, or local income-based public assistance program; received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program involved (exclusive of unemployment compensation, child support payments, payments, and old-age and survivors insurance benefits received under section 202 of the Social Security Act (42 U.S.C. 402)) that, in relation to family size, does not exceed the higher of--
  - the poverty line, for an equivalent period; or
  - 70 percent of the lower living standard income level, for an equivalent period;
- is a member of a household that receives (or has been determined within the 6-month period prior to application for the program involved to be eligible to receive) food stamps;
- qualifies as a homeless individual, as defined in subsections (a) and (c) of section 103 of the Stewart B. McKinney Homeless Assistance Act (42 U.S.C. 11302);
- is a foster child on behalf of whom State or local government payments are made; or
- in cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own income meets the above requirements, but who is a member of a family whose income does not meet such requirements.

b. Special Populations to be Served

San Francisco’s Strategic Five Year Plan states that we will augment the above target group “to include, for example, individuals with long-term welfare dependency, those with low basic reading and math skills, mental or physical disability, learning disability, alcohol or substance abuse, criminal record, long-term unemployment, computer illiteracy, single parent home or unstable family environment, dislocated workers, elderly workers, persons with a lack of labor force attachment, and those with a past inability to achieve a living wage”. Also included in the Plan are: displaced homemakers, migrant and seasonal farm workers, minorities, and veterans. Recommended additions are: members of families receiving MediCal benefits only, high school dropouts, residents of an Enterprise Community, public housing residents or members of a family receiving a “section 8” voucher, and individuals receiving food stamps.

c. Occupations and industries to be targeted

To effectively serve San Francisco employers and residents, training programs must prepare participants to enter occupations for which there is (or will be) a demand. In addition, targeted occupations should either pay a wage approaching self-sufficiency or be the first step along a career advancement path that ultimately will. Both of these criteria – size of demand and pay – should be used in determining which occupations are targeted for training.

In-demand occupations

With few exceptions, all training programs should target an occupation that is expected to experience above-average employment growth, results from a specific economic development initiative, is experiencing a severe labor shortage, or fills an unmet need for incumbent worker skill upgrading. The size of the proposed training program must not exceed the magnitude of expected employment growth in the related occupation.

Occupations with below-average growth may be targeted only if (1) a sufficient number of job openings from turnover are expected in the occupation and evidence indicates that the chosen occupation represents the best possible opportunity for target clients to enter or move up in the workplace; or (2) the training program is customized to a specific employer or group of employers who indicate that sufficient employment opportunities await clients who successfully complete training. On-the-job training programs that do not target a specific occupation, but for whom employment entry occurs prior to training completion are allowable under this exemption.

Occupations which pay adequate wages and enable career advancement

It is the intent of the WIA Adult program to help prepare people for jobs that will ultimately lead to their economic independence, rather than to place clients into entry-level jobs with low wages and little advancement potential. As a result, it is desired that all training programs target an occupation whose entry wage is at least $10 per hour and represents at minimum, the first step along a career path leading to economic self-sufficiency.

The report, *San Francisco's Labor Market: Employment Projections and Wages* contains projected growth rates, number of openings (from growth and turnover) and average wages for specific occupations that can be used to determine which occupations are preferred according to these two criteria. This report was distributed at the PRC meeting and will be available at your meeting and at the solicitation bidder's conference.

d. Methods of Training

Training services allowed under WIA Title IB include:

- occupational skills training;
- on-the-job training;
- programs that combine workplace training with related instruction, which may include cooperative education programs;
- private sector operated training programs;
- job readiness;
- skill upgrading and retraining;
- entrepreneurial training;
- customized training conducted with a commitment by an employer to employ an individual upon successful completion of the training; and
- adult education and literacy activities provided in combination with one of the services above.

The Committee should prioritize types of training that maximize the impact of the limited funds available under WIA. On-the-job training and customized training hold particular promise because they use WIA funds to leverage training dollars from employers, while also guaranteeing job placement for participants who successfully complete training. Involving employers through these training technologies thus increases the total amount of local resources dedicated to job training. Moreover, on-the-job and customized training are more likely than other training technologies to meet the needs of particular employers. Because on-the-job and customized training both require employer financial investment and are more likely to result in employers' fulfilling their labor demands, these training technologies create the potential for employers' long-term involvement as partners in the workforce development system.

However, it should be kept in mind that special populations may require other training methods prior to, or in place or as part of, on-the-job and customized training. For example, special populations may respond better to training that includes a classroom component that teaches job readiness and other professional development or "soft skills." Proponents must provide the rationale for a particular type of training for the special population they propose to serve.

Training providers must be certified by the WISF and the EDD as eligible to provide training under WIA.

3. Individual Referral Contracts or Individual Training Accounts (ITAs) for Persons With Less Than Self-Sufficient Income

The Individual Referral (IR) activity uses a process in which One Stop system staff refer individuals to existing training programs listed on the State's Employment Training Providers List (ETPL); it does not include on-the-job or customized training.

a. Income threshold of individuals to be served

The most current Self-Sufficiency Standard (SSS) for San Francisco was previously distributed to the WISF Board, its committees, staff, and the public.

75% of the Self-Sufficiency Wage 2002 for San Francisco

	One Adult	*One Adult, One Child (example only; varies by family size)*			
	Adult	*Adult + infant*	*Adult + preschooler*	*Adult + schoolage*	*Adult + teenager*
-Hourly at 75%	*8.70*	*16.89*	*16.78*	*13.78*	*11.72*
-Annual at 75%	*18,096*	*35,125*	*34,906*	*28,667*	*24,375*

"Low Income" (WIA definition: 70% LLSIL or Poverty Guideline)

	One Adult	Family of Two
-Annual Poverty	*8,860*	*11,940*
-Annual 70% LLSIL	*8,570*	*14,040*

b. **Occupations and industries to be targeted**
(See above, IV.C.2.c)

c. **Methods of Training**
The training methods for this population are the same as those for the population with multiple barriers or special needs (see above, IV. C. 2. d.). As with the special needs population, the Committee should consider establishing a preference for funding training that is likely to have the most impact in terms of outcomes—for both job-seekers and employers—for the amount of money invested.

Training providers must be certified by the WISF and the EDD as eligible to provide training under WIA.

D. Tentative Solicitation Timetable

Event	Date
Staff design recommendations to Program Resources Committee	February 25, 2003
PRC approval of program design and RFP selection criteria	March 4
Mayor/Executive Committee approval of design & selection criteria	March 12
Announcement of RFP and schedule	March 13
Bidders' Conference	March 20
Due date for proposals	April 14
Proposal review, Staff funding recommendations mailed out	April 29
Program Resources Committee public hearing	May 6
Mayor/Executive Committee approval of subcontracts	May 14
WISF Board ratifies Executive Committee action	June 18
Programs begin	July 1, 2003

E. PROPOSAL EVALUATION PROCEDURES

Proposals will be invited from providers who are experienced and capable of providing training services of demonstrated effectiveness to San Francisco's Special Populations.

RFP packages with preparation instructions and forms will be available at a Bidders' Conference and immediately after it on the Internet and at the PIC 745 Franklin Street office.

Substantial points in the evaluation criteria will be awarded for leveraging other funds. Each proponent will be expected to attest to its method of coordination and linkage with the following (for example) system initiatives and activities:

- One Stop San Francisco Centers and System,
- First Source Hiring Administration,
- Employers,
- Others to be identified by the proponent.

Technical assistance will be provided by senior members of the PIC staff who have program experience. The RFP package will include a form for making inquiries of the PIC, which may be sent by facsimile transmittal. Responses to inquiries will be published on the PIC's website as soon as possible following fax receipt.

Proponents will be encouraged to apply for the largest possible 12-month project they can reasonably manage. This "ceiling budget" allows the PIC to increase a high-performance contractor's funding if additional adult funds become available.

In San Francisco, funding for successful proposals may be provided from additional public or private sources (other than WIA) that may become available. Examples include local public assistance funds, Governor's discretionary funds, or others to be identified.

WIA funds may be committed to local activities only after the Mayor and WISF Board concur on a budget for their expenditure and only when made available by the federal and State governments.

Under strict policies of both the City and PIC, no proposals will be accepted after the due date and time. Incomplete proposals will not receive review or recommendation. All costs associated with the development and preparation of a proposal must be borne by the proponent.

A Proposal Review Team will be appointed by the PIC President. No individual will be appointed to the Team if he or she has an economic interest in any of the proponents under consideration; each member will sign a detailed conflict of interest declaration. The Review Team will evaluate proposals and provide recommendations through the PIC President to the Program Resources Committee.

No member of the Program Resources Committee with a conflict of interest will be allowed to discuss, propose motions, or vote on any matter which affects the funding of individual organizations; each member will be asked to sign a detailed conflict of interest declaration before the Committee begins deliberations.

F. CONTRACTING PROCESS AND TERMS

All contracts will be cost reimbursement, performance-based. The term of subcontracts may vary, but in general will be for one Program Year (July to June). Subcontract renewals will be predicated on availability of funds, need in the community for the services, and good performance records and ETPL standing.

The PIC will reserve the right to negotiate proposals and participant characteristics to insure that all of WIA's mandated performance minimums are met. If supplemental non-WIA funding is offered, goal alteration to comply with differing performance requirements will also be negotiated.

The workforce investment system has a lot of un-funded mandates, with which subcontractors' assistance will be needed. Examples include the need to:

- Attend development and training sessions designed for continuous improvement of the system [i.e., Committee of Community Agencies' (CCA) meetings];
- Participate in a One Stop system-wide referral and tracking system;
- Provide performance data for the annual ETPL process;

- Help develop and collect information for employer and client satisfaction measures; and,
- Provide safe and easily accessible locations that comply with the Americans with Disabilities Act.

V. PROPOSAL SELECTION CRITERIA

The RFP will invite proposals consisting of required forms, narrative responses to specific questions, and attachments.

Recommended proposal selection criteria:

	Criteria	Points
A.	**Program Description** ➢ Description of the special population to be served, and rationale why target population cannot be served through One Stop IR system; ➢ Program activities and services to be provided; likelihood that the program will be effective.	20
B.	**Employer Involvement and Targeted Jobs** ➢ Tangible linkages with and support of employers; ➢ Quality of targeted jobs (including occupations and employment sectors to be targeted, wage, benefits, career advancement potential)).	20
C.	**Organization and Coordination** ➢ Proposed organization of the project; ➢ Linkages and coordination with institutions and other agencies in the adult service One Stop system; ➢ Leveraged services and funds	25
D.	**Experience with Special Populations** ➢ Proof of prior experience in workforce development with the special population identified; ➢ Past performance (demonstrated effectiveness) in serving this population with multiple barriers.	25
E.	**Administration and Financial Management** Prior experience and track record in managing adult service programs, and overall completeness of proposal.	10
	TOTAL POINTS	**100**

The RFP will emphasize to proponents the importance of attending public hearings conducted by the PRC in preparation for its recommendations to the Mayor and Executive Committee. Appeals by proponents will be heard and acted upon only at the PRC and Executive Committee's public hearings. The burden of communications is on the proponent.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 12, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION FOR ADDITIONAL CATEGORY OF "INDIVIDUAL REFERRAL" JOB TRAINING PROVIDERS FOR PUBLIC ASSISTANCE RECIPIENTS IN WELFARE-TO-WORK PROGRAMS (Agenda Item 5D)

The Workforce Investment San Francisco (WISF) Board is asked to approve the selective use of educational agencies listed with California's Bureau for Private Postsecondary and Vocational Education (BPPVE) as eligible vendors of job training in the Welfare to Work programs.

The Executive Committee met today, solicited public testimony, reviewed and approved the recommendations. It was the decision of the Committee that BPPVE usage be permitted in all Welfare to Work grants, including funds granted directly to the PIC by the Department of Labor. Staff will make every effort to apply this policy in a manner that is transparent to the source of funds.

BACKGROUND

Two categories of training agencies are currently approved to provide job training and placement assistance to public assistance recipients enrolled in the Department of Human Services' Welfare to Work (WtW) programs.

> **Category A**: In March 2001, the Private Industry Council, Inc. (PIC) issued a Request for Proposals (RFP) and a Request for Qualifications (RFQ) for employment and training services for public assistance recipients enrolled in the CalWORKs, Personal Assisted Employment Service (PAES) and Non-Custodial Parents (NCP) case-managed Welfare to Work programs. These solicitations resulted in the selection of 20 subcontractors for cost reimbursement subcontracts and 61 vendors for "individual referral" training at various single unit prices. All of these vendors provide employment training and placement designed for public assistance recipients and were procured through June 30, 2004.
>
> **Category B**: In July 2000, the Workforce Investment Act (WIA) created a statewide Eligible Training Providers List (ETPL) designed to serve the interests and needs of job seekers. All agencies providing employment training at cost to the WIA programs are required to be ETPL-listed, and must provide annual performance information in order to remain listed. Many — but not all — of the ETPL-listed

agencies provide job placement assistance in addition to training. In some cases, the staffs of the DHS or PIC are, by default, responsible for job placement after training.

The objective in both categories was to create an array of off-the-shelf programs capable of providing customer choice along with services tailored to match the needs of low income and public assistance clients. In approving your recommendations, the WISF Executive Committee authorized the use of either category to train DHS-funded Welfare to Work clients with the staffs responsible for "safety net" job placement if the training vendor did not provide it.

DISCUSSION

The RFP process awards a specific amount of funds for a prescribed service and service level and therefore requires proposals to be received at the same time, reviewed and scored together. The RFQ individual referral approach allows staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process established a vendor list that was augmented by the WIA Eligible Training Provider List. Respondents were encouraged to apply, and, if they met the minimum requirements under the RFQ, were added to the ETPL list.

Since this inclusive RFP/RFQ-plus-ETPL policy was adopted, the DHS has encountered several clients whose needs were not met by any of the off-the-shelf training programs.

RECOMMENDATION

The Board is asked to permit contracting with selected training providers who have a Bureau for Private Postsecondary and Vocational Education license/certification (as "**Category C**" training agencies).

The requesting DHS staff will research and recommend, in writing, all such proposed vendor contracts based on considerations of quality, price and appropriateness to client need. In the event that a vendor does not provide placement services, the DHS staff will perform this function by arrangement with the vendor. In such cases, the cost will be set, according to the services provided and the outcomes, as a result of a collaborative effort of the vendor and DHS.

The PIC staff will execute contracts with vendors who hold a BPPVE license/certificate as long as the DHS pre-approves both the training component and provider as meeting the vocational needs of the individual CalWORKs or PAES participant and placement outcomes are included in the participant's Employment Plan.

To provide oversight, all BPPVE-listed vendors selected in this way will be reported to the Program Resources Committee for information.

If you have questions before the meeting, please call Briana Moore Wirrom at (415) 557-5456.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 12, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: EVALUATION CRITERIA FOR WELFARE TO WORK PROGRAMS (Agenda Item 5E)

The Workforce Investment San Francisco (WISF) Board is asked to confirm the use of evaluation criteria for performance under the Welfare to Work programs. If confirmed, the criteria will be used as a basis for recommending third year funding extensions (July 1, 2003 to June 30, 2004).

BACKGROUND

An RFP/RFQ for Welfare to Work (WtW) funded employment, supportive and legal services was issued on March 23, 2001 which stipulated that subcontractors could be funded for a maximum total of 36 months based upon performance. The Research and Evaluation Committee adopted a set of evaluation criteria in February 2002, which were used by the PRC to review nine months of program performance statistics to determine second year funding recommendations for PY'2002-03.

RECOMMENDATION

For the next performance review, the Executive Committee recommends that eighteen months of program activity be used to evaluate those programs active from July 1, 2001 through December 31, 2002. This evaluation will also take into account the Individual Referral vendors using the same established evaluation criteria used for Cost Reimbursement contractors.

The eighteen-month time frame presents a broader view of statistical data that incorporate programs with one or two year funding periods. This evaluation of subcontractor performance will be used to determine whether to increase or reduce the amount of the subcontracts and/or to extend or curtail their length through the final year of the three-year RFP solicitation period.

These criteria are specific to the types of subcontracts solicited in the March 13, 2001 RFP/RFQ. In some cases job placement was not the intended outcome of the contract. For those contracts, job placement is not recommended as an evaluation criteria.

The Executive Committee recommends that each subcontractor be evaluated individually based on the subcontract entered into with the PIC using the following criteria:

Job Training/Job Placement/Job Retention Component

1. The actual number of enrollments compared to the planned number of enrollments.
2. The actual number of completions compared to planned number of completions.
3. The actual number of placements compared to actual number of enrollments (60% minimum).

4. The actual placement rate compared to the planned placement rate. *
5. The proposed minimum wage for participants placed in jobs compared to the actual average wage achieved.
6. Actual compared to planned expenditures, timely submission of invoices, attendance forms, and other financial factors (i.e. audits, and other required paper work, etc).

**Subcontractors have a planned placement rate negotiated in their contract.*

Career Advancement/Job Retention Component

1. 80% retained employment after 9 months.
2. 80% increased their income including hourly wage and health benefits.
3. 50% achieved skills enhancement objectives.

Supportive Services

1. 30% completed training or services as specified on their Employment Plan
2. 15% placed into employment.
3. 10% retained employment for 270 days or more.

Legal Services Component

1. 65% positive resolution for those who obtain legal services.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR THE DESIGNATION OF THE OPERATOR OF THE ONE STOP SATELLITE CENTERS (AGENDA ITEM 5F)

The Workforce Investment San Francisco (WISF) Board is asked to approve the following recommendation to expand the designation of the current Operator Consortium from Operator of the comprehensive full service Center only, to Operator of the two existing Satellite Centers. Currently, the Department of Human Services (DHS), Employment Development Department (EDD), National Council on Aging (NCOA), the Private Industry Council, Inc. (PIC), and City College of San Francisco (CCSF) are partner members of the recommended One Stop Operator Consortium.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

BACKGROUND

In June 2001, the Executive Committee approved recommendations from the One Stop Committee concerning the organizational and management structure of the One Stop system in San Francisco. At that time, the Committee approved the following list of recommendations:

- It is recommended that there be one full service Center as described by law and regulation and that Center shall currently be located at 3120 Mission Street.

- It is recommended that the role of the "full service" Center is to provide at a minimum the core services described in the WIA (Section 662.240 of the Final Regulations).

- It is recommended that intensive services also be available through the full service Center (Section 663.100 of the Final regulations) and that training services be accessible.

- It is recommended that there shall be two levels of access to the One Stop System: full service center and satellites. The role of a satellite is to provide universal access to information about services available through the One Stop system and referrals to the system. Where available, satellites could also provide access to some services.

  Definition: A Satellite is a site that offers something less than full service as defined by Workforce Investment Act. Currently this would include two other existing Centers and all of the community-based organizations that serve as Access Points.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2499
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

- It is recommended that the local definition of the "Operator" is that entity which operates the 3120 Mission Street Center and participates in the coordination of satellite activities within the system.

- It is recommended that the role and responsibility of the "Operator" include the following:
  - Implements services described in the MOUs between the partners and the LWIB
    - ☐ Ensures core services are offered as defined by the law
    - ☐ Recommends policy changes to the LWIB
    - ☐ Is accountable to the LWIB for terms of the Operator/LWIB "agreement"
    - ☐ Is empowered to enforce the MOUs on behalf of the LWIB
    - ☐ Provides recommendations for funding
    - ☐ Manages the Center budget
  - Convenes the One Stop partners to improve the service delivery
  - Coordinates seamless service delivery
  - In collaboration with the LWIB, develops and maintains the system's technology links
  - Implements marketing
  - Recommends a design/delivery system for employer/business services. This will include input from the business community and clarification about how such services will be accessed.

- It is recommended that a "Consortium" model be adopted as an Operator.

- It is recommended that the Workforce Investment San Francisco Board consider establishing a baseline level of funding for the development of the infrastructure and for the operation of the system, as well as for the full service center.

Staff will be available at the meeting to answer your questions.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PY'2003 WORKFORCE INVESTMENT ACT (WIA) ALLOCATIONS AND PROPOSED STRATEGIC BUDGET PRIORITIES RECOMMENDATIONS (AGENDA ITEM 5G)

The Workforce Investment San Francisco (WISF) Board is asked to approve the following recommended budget to contribute to the support of the development and operation of the One Stop system and the comprehensive Center. Although WIA allocations have not yet been released by the State, the One Stop Operations and Services Committee reviewed and discussed staff and Operator Consortium budget recommendations at their meeting on March 19 before approving the following recommendations.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

BACKGROUND

The One Stop delivery system for workforce development services, considered the cornerstone of the Workforce Investment Act (WIA), is intended to provide streamlined access to workforce development services and programs. Rather than requiring customers seek employment-related information and services at several different locations (which is often costly, discouraging and confusing), WIA mandates that communities integrate multiple workforce programs and resources through a convenient user-friendly One Stop service delivery system. Essentially, this system aims to both simplify and expand access to services for job, education, and training seekers, as well as for employers.

The WIA regulations specifically define the One Stop system as consisting of one or more comprehensive physical One Stop centers in a local area. A full complement of the statutory core services must be provided at the comprehensive Center, as well as access to the other activities provided through the mandatory One Stop partners. Core services may be provided at the Center in a variety of ways, including through the utilization of appropriate technology. In addition to the required core services, local systems are encouraged to make additional core services available, such as the provision of information relating to work supports, including Food Stamps, Medical, child support services, and the Earned Income Tax Credit.

Additionally, the Act describes expanded arrangements to supplement the comprehensive Center, including: (1) A network of affiliated sites that provide one or more of the programs, services and activities of the partners; (2) a network of One Stop partners through which all individuals are provided information on the availability of workforce development services in the local area; and (3) specialized centers that address specific needs. In essence, this structure promotes a "no wrong door" approach. If an individual enters the system through one of the network sites rather than the comprehensive Center, the individual may obtain certain services at a network site and must be able to receive information about how and where the other services provided through the One Stop system may be obtained.

715 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415 923 4003 • Fax 415 923-6966
www.picsf.org • e-mail: [illegible]

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415 431 8700 • Fax 415 431-8702
TDD 800 735 2929 (CRS)

In June 2001, the WISF Board approved recommendations from the One Stop and Executive Committees to adopt a design model for the One Stop system in San Francisco. As one of the earliest actions taken by the WISF Board, the adoption of the model was a formal acknowledgement of the existing network of local partners, which had been contributing their resources, expertise and dedication to the One Stop system. As part of that recommendation, the WISF Board approved the designation of the Operator Consortium as the Operator of the Career Link Center - Mission and the establishment of a baseline level of funding for the development of the infrastructure and for the operation of the system, including the full service center.

Intended to direct our focus on compliance as the starting point, the Operator Consortium and Board staff have concentrated their efforts on using WIA resources to supplement other partner contributions, bringing the comprehensive Center into full compliance. Since then, the Compliance Plan for the Career Link Center - Mission has evolved beyond simply compliance to include operational and continuous improvement plans.

TODAY'S ONE STOP

Most recently, the Centers have experienced a profound increase in demand, with the local One Stop system currently serving thousands of job, education, and training seekers each month. In January 2003, the comprehensive Career Link Center - Mission alone had over 8,000 visits. While the Center serves a diverse population of job seekers, many of the Center customers have limited English proficiency and have low or no income, as well as many barriers to employment. A "snapshot" on any given day at the Center would show a steady flow of people, each with needs completely different from the next. The Career Link Center - Mission has identified over 70 different types of customer requests received at the front desk alone!

Once registered at the Center, the customer is given an orientation to the services on-site and throughout the system. These services include: needs and skills assessment, information about the job market, job search assistance, job placement, resume and interview assistance, career counseling, workshops, resource library and much more, all provided at no cost to the customer. Information about other services such as childcare, transportation, and health care is also available. As the name suggests, the One Stop intends to provide access to all services in one user-friendly location.

One Stop San Francisco is also expanding efforts to respond to the needs of the business community by providing access to many services through one point of contact. As an example, One Stop staff were recently approached by Merrill Corporation, a nationally-based firm interested in partnering with (as they phrased it), "the San Francisco version of the WorkSource system in Los Angeles." With the positive WorkSource experience as their frame of reference, Merrill's recruiters wanted to duplicate that experience in the Bay Area. A One Stop team used Merrill's own vision of what was needed and pulled together a "services packet". As a result, the employer's needs were met, and the One Stop system developed an ongoing source of local jobs for work-ready candidates from the partners and the affiliates, as well as another model for serving the employer. This example represents just one of the successful projects that demonstrate the System's increased engagement of the private sector. Guided by the work of the Employer Services Committee, the One Stop system is developing a business services strategy for serving the employer customer.

BUDGETING FOR THE ONE STOP

Last year, the WISF Board approved an overall One Stop System Support budget that included budget categories intended to support compliance at the comprehensive Center, as well as activities supporting the One Stop System, with a separate consideration of the One Stop System technology costs. As a condition of the approval of the technology funding, the Executive Committee requested (and received) a detailed Technology Plan at their October 2002 meeting.

At its meeting on March 12, 2003, members of the Executive Committee stated that in order to make a fully informed decision about the WIA allocations proposed by the Program Resources Committee and the Employer Services Committee, it would need information from the One Stop Committee providing some results from last year's allocations to the One Stop and the rationale to support them.

For your review, please find attached information provided by the Consortium Operator detailing costs and customer volume related to maintaining compliance at the Career Link Center – Mission. Included in the Consortium Operator's "Outcomes Overview" packet is:

- Customer Volume Report
- Operational Cost Analysis
- Operational Plan
- Customer Satisfaction Analysis Report

While the One Stop system is designed to enhance access to services and improve outcomes for all individuals seeking assistance with their career-related needs, WIA does not require registration or collection of outcomes information for those using only the core self-service or informational activities. Given that during the month of January 2003 customer visits to the Career Link Center – Mission alone exceeded 8,000, tracking the extraordinary volume of core users at every site will be a critical challenge for the local system.

Realizing that some assessment of the value of these services is important for determining what resources will be devoted to them, the One Stop system is currently transitioning from a paper-based "sign-in sheet" approach to a sophisticated electronic tracking system for measuring both customer characteristics and the services they use. This mechanism, commonly referred to as "the swipe card system", is being piloted at Career Link Center - Mission and should be in full use at that site by the end of April 2003. The development of customer intake form for system data collection was painstakingly designed with input from partner agencies and Board staff to determine what information about services and customer characteristics is required, as well as desired.

As recommended by the Act, the Operator Consortium has also sought feedback from customers at the comprehensive Center as part of continuous improvement efforts, as seen in the Customer Satisfaction Survey results included in the Consortium report. Both the swipe card system and customer satisfaction activities will be expanded to include the Satellite Centers and other One Stop system affiliates.

Additionally, staff submits details about the activities required to support the operations of the One Stop system in the following table. In doing so, we seek to clarify the extent of costs necessary to support both the One Stop system and subcontract system, show where in the budget those costs occur, and substantiate the yield on investments in both the One Stop system and in training subcontracts. The following breakdown of the Workforce Investment Act funds for San Francisco intends to show the budget structure that supports WIA administration, operations and system support, and direct services.

100% WIA (Adult, Dislocated Worker, and Youth) PY' 02-03

10% Administration	15% Operations and System Support	75% Direct Services	TOTAL PY' 02--03 WIA allocations
$621,120	$931,679	$4,658,397	$6,211,196

10% PIC Administration, including:

- Personnel
- Fiscal / Audit
- Procurement
- Legal

15% PIC Operations and Management, including:

ADULT 27.4% of 15%	ADULT IRs 3.6% of 15%	DIS. WKR. IRs 32.6% of 15%	YOUTH 29.6% of 15%	One Stop 6.8% of 15%
4.1 % of 100%	0.6 % of 100%	4.9 % of 100%	4.4 % of 100%	1.0 % of 100%
$255,524	$33,908	$303,696	$276,192	$62,359
Contract administration	Contract administration	Contract administration	Contract administration	System operations
Eligibility	Eligibility	Eligibility	Eligibility	Consortium membership
MIS	MIS	MIS	MIS	
ETPL	ETPL	ETPL		ETPL
Staff	Staff	Staff	Board support	Board support

75% Direct Services, including:

ADULT 23.7% of 75%	ADULT IR's 2.7% of 75%	DISL. WRKR. 30.9% of 75%	YOUTH 24.0% of 75%	One Stop 18.7% of 75%
17.8 % of 100%	2.0 % of 100%	23.2 % of 100%	18.0 % of 100%	14.0 % of 100%
$1,102,441	$125,000	$1,441,794	$1,118,042	$871,120
9 subcontracts		IR contracts		Served *(7/02 – 2/03 only)*
184 trained (planned for year)	25 trained (planned for year)	230 enrolled (actual)	499 trained (planned)	52,156 @ 3120 Mission 34,922 @ 801 Turk

As indicated in the preceding tables, support to the activities related to both administering subcontracts and the One Stop system are included in both the 15% and 75% categories. To further explain the costs related to the One Stop system, staff has prepared the following compilation of the primary activities related to the administration of the entire One Stop system.

Operating the One Stop System
TECHNOLOGY - Activities include planning and budget development; coordinating with One Stop Consortium and other partners; developing a universal intake form and sample reports; developing and executing multiple solicitations for professional services; developing presentations for partners and potential funders; acting as project lead / main point of contact for consultants, partners, staff, and WISF Board; staffing the Technology Workgroup of the One Stop Committee
MARKETING – Activities include planning; coordination with One Stop Consortium and other partners; developing a strategy for marketing the One Stop system to different customer bases; conduct and report assessment of system needs; developing and executing solicitations for creating system brand identity, affiliation devices, marketing plan and materials; providing public relations and marketing services on an as-needed basis, staffing the Marketing Workgroup of the One Stop Committee
CAPACITY BUILDING – Activities include planning and coordination of system-wide training on One Stop service delivery principles, One Stop leadership principles, and building a One Stop business services component; attending and presenting at State-wide conferences and other training events; acting as project lead and main point of contact for training brokers, consultants, partners, staff, and WISF Board; maintaining active participation in CWA's Bay Area One-Stop Community
BUSINESS SERVICES - Activities include strategic planning; serving as a liaison to employers seeking a relationship with (and services from) the local One Stop system; conduct presentations to individual and groups of employers; participate in local, regional, and State business services-related activities related to business services; collaborate with the Employers Services Committee and staff to develop business services component in the One Stop system
ONE STOP CERTIFICATION – Activities include researching guidelines and best practices; developing and recommending design and timeline best suited for local system; synthesizing and presenting information to the One Stop Committee and the WISF Board
ACCESS & CUSTOMER FLOW– Activities include mapping the flow of the jobseeker and employer customers throughout the system; developing and communicating protocols for customer service; developing tools for partner staff to deliver quality customer service; assessing special accessibility needs of customer groups, such as those with disabilities
ELIGIBLE TRAINING PROVIDER LIST (ETPL) - Activities include the administration and promotion of the ETPL, developing and recommending policy to Board; provide technical assistance to training provider community concerning application process and other required certifications; other activities related to the ETPL
OTHER ACTIVITIES – developing and managing system budget; fostering relationships with stakeholders and the community; developing and recommending system policies; leveraging partnerships with public and private sector; participating as member of Operator Consortium; staffing the One Stop Committee of the WISF Board

FUTURE OF THE ONE STOP SYSTEM

The current Administration's plan for WIA reauthorization proposes to continue to transform and further integrate the One Stop service delivery platform into a cohesive workforce investment system that can respond quickly and effectively to the changing needs of the new economy. WIA reauthorization also proposes to create a new way to fund the cost of the One Stop system by designating specific funds to support the One Stop infrastructure. Considering President Bush's proposed plan to promote Personal Reemployment Accounts that would be administered through the One Stop system, a convincing rationale exists for supporting a robust local One Stop system.

RECOMMENDATIONS

- It is recommended that a baseline level of funding be contributed to the continued support of the development and operation of the local One Stop system and the comprehensive full service Center.
- It is recommended that the percentage of those funds contributing to the support the local One Stop system and the comprehensive full service Center be the same as for 2002, only if the 2003 WIA allocation is at least 90% of the 2002 allocation. However, if the WIA allocation is less than 90% of the 2002 allocation, it is recommended that the percentage of funds needed to support the local One Stop system be renegotiated.
- Specifically, the Executive Committee recommends that at a minimum, the following investment of the PY' 2003 WIA (Adult, Dislocated Worker, and Youth) allocations be committed to maintain the support of the One Stop System as follows:

Description	2001	2002	2003
Revenue/allocations	**$5,667,874**	**$6,211,196**	**100%**
PIC – Administration	**566,787**	**621,120**	**10%**
PIC - Operations & Mgmt.	**860,968**	**931,679**	**15%**
One Stop System Support			**13%**
Compliance at full service Center	*556,000*	*553,000*	
Resources for Satellite Centers	*-0-*	*35,000*	
Capacity Building	*-0-*	*8,000*	
Marketing & Public Relations	*-0-*	*70,000*	
Phonebook listings	*-0-*	*5,000*	
Other costs	*-0-*	*-0-*	
	556,000	**671,120**	
One Stop System Technology *Swipe card system* *System integration planning* *System integration implementation* *Data collection/ reporting / tracking* *Web site revision and redesign*	**-0-**	**200,000**	
WIA Training	**$3,684,119**	**$3,487,277**	**62 %**

Staff will be available at the meeting to discuss the information provided and to answer any questions you may have.

ONE
STOP
SAN FRANCISCO

A Partnership
for Employment

CAREER LINK CENTER – MISSION OUTCOMES OVERVIEW

MARCH 2003

- ❖ Volume of Customers Report
- ❖ Operational Cost Analysis
- ❖ Operational Plan
- ❖ Customer Satisfaction Analysis Report

Career Link Center - Mission
Number of Customers Served Monthly

	MAIN SEGMENT			MONTHLY TOTAL	AVG
2001	UI	SS	ES	CUSTOMERS	DAILY
SEPTEMBER	759	321	2577	3657	182.85
OCTOBER	1298	525	3202	5025	228.41
NOVEMBER	1042	384	2787	4213	210.65
DECEMBER	810	340	2761	3911	195.55
2002					
JANUARY	1732	601	4175	6508	309.90
FEBRUARY	1079	639	3491	5209	260.45
MARCH	1066	629	3423	5118	319.88
APRIL	1256	661	3708	5625	267.86
MAY	954	622	3776	5352	243.27
JUNE	853	554	3445	6196	309.80
JULY	1099	721	4047	5867	279.38
AUGUST	1019	757	4420	6196	281.64
SEPTEMBER	1161	788	3870	5819	290.95
OCTOBER	1277	742	4956	6975	317.05
NOVEMBER	1116	681	3983	5780	321.11
DECEMBER	987	698	4334	6019	286.62
2003					
JANUARY	1649	941	5609	8199	390.43
FEBRUARY	1129	865	5307	7301	384.26

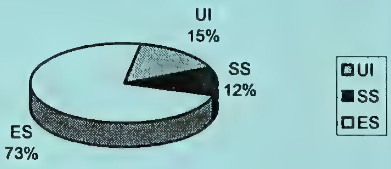
Note:
ES: Employment Services Customers
UI: Unemployment Insurance Customers
SS: Social Services Customers

Total Number of Customers Served from July 2002 to February 2003: 51,156*

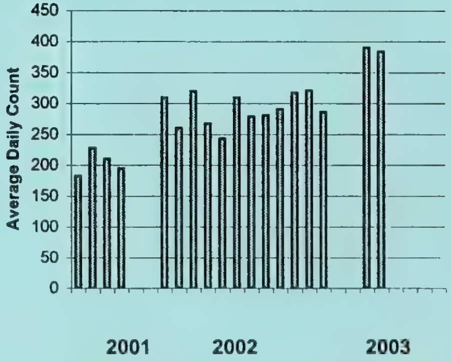
* Customers are counted once for each day they receive services

****A February year to year comparison shows an increase of over 34% in the number of customers using the services at the Center.**

February 2003
CUSTOMER SEGMENTATION



Monthly Average Daily Customer Count
Sept. 2001-February 2003**



Career Link Center - Mission
Operational Cost Analysis
2001 - 2003

Item	Estimated Annual Cost for WIA One Stop Mandated Services **Only**	WIA Fund	
Administrative costs			
3119 Mission Building Lease	$ 66,901		
3120 Mission Building Lease	$ 231,059	Annual rent for	
		shared space and	$ 203,940
Staff including fringe @ 26%)	4,059,957	Personnel	$ 237,420
Total Admin Costs	**$ 4,357,917**	-	
Operating Costs		Operation Cost	$ 101,640
Computer repairs with DHS time	$ 50,500		
Copier machine	$ 24,000		
Fax machine	$ 5,000		
Office supplies	$ 29,250		
Telephones service	$ 17,280		
Utilities	$ 64,080		
Janitorial Services			
Security guard	$ 36,036		
Building repairs/Tenant Improvements	$ 10,600.00		
Staff Development	$ 11,466	Staff Development	$ 10,000
Marketing materials	$ 11,000		
Subtotal	$ 259,212		**$ 553,000**
Administrative costs	$ 12,960		
Total Operating Cost	**$ 272,172**		
TOTAL	**$ 4,630,089**		**$ -**
FIXED ASSETS			
PESCO Assessment	$ 40,000		
Purchased furniture	$ 145,000		
Computers for staff	$ 202,500		
Telephone equipments	$ 8,500		
Total Assets	**$ 396,000**		
GRAND TOTAL	**$ 5,026,089**		**$ 553,000**
* Column D included $556,000.00 fund awarded by WIB			
Partners collocated in the center:			
Department of Human Services			
City College of SF			
Employment Development Development			
National Council of the Aging			
Private Industry, Inc.			
Arriba Juntos			
Dept. of Child Support & Services			
Dept. of Rehabilitation			
Treasure Island Job Corp.			
Northern California Service League			
NOTE: The operational cost of the entire center including non-mandated support services exceeds $9M			

ONE
STOP
SAN FRANCISCO

A Partnership
for Employment

CAREER LINK CENTER – MISSION
OPERATIONAL PLAN
2001 - 2003

* This plan provide details regarding **Compliance, Improvements** and **Schedule of Activities**

CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
Eligibility Determination Determination of whether individuals are eligible for WIA Title IB	**Eligibility Determination** • Adequate staffing resources available to provide eligibility determination for all programs	**Eligibility Determination** • Information is available for eligibility determination for Wagner-Peyser, FoodStamps, Medical, CalWorks ▪ Rapid Response services are available through the Center ▪ ***WIA Title I training and eligibility information is available***	**Eligibility Determination** • Increase availability of services

Outreach
Activities to encourage & enable customer access to services for all potential customers
Provided to universal population
	Establish Phone Information system for Career Link Center
	• One point of contact for Center and System Information
	  • Multilevel recording and router system
	    • Comprehensive information about the Center, services, location, hours, etc.
	  • Center reception and staff lines with voicemail
	  • Phones dedicated for customer use relating to Job search
	Listing in phonebook yellow pages and other directories
	Develop and distribute marketing materials
	• Center-specific brochures and workshop flyers
	• Event-specific Job fairs, forums and other materials
	• Integration into partner publicity networks
	Improve the cross- referral process and strengthen the complementary partnership with the CBOs
		Outreach
		• ***A sophisticated telephone system has been installed and a main phone number used as a main point of contact for the Center has been put in place. A recording providing detail and relevant information and voicemail system is in operation***
		• ***Multiple directory listing has been ordered***
		• ***The Center's external signage for both 3120 and 3119 Mission buildings has been designed, installed and outside landscaping has been improved***
		• ***The internal signage used to guide the customer within the Center, including the Directory of Services and the List of Partners, has been designed and installed***
		• ***The hours of the operation has been expanded to one night a week to increase accessibility to customers***
		• ***Brochures and marketing materials containing information about the Center and its services have been designed, printed, and distributed throughout the system***
		• ***Staff have started doing outreach; visiting other agencies and CBOs to establish referral linkages***
		• ***The Center's monthly Schedule of Activities is shared with CBOs and other agencies in the system***
			Outreach
			• The self-assisted Orientation is being prepared for implementation
			• Expand information to include Satellites, Access points, Web site, etc.
			• Enhance outreach activities to strengthen the connection with the system
			• Setup of a marketing workgroup is in process. The workgroup will recommend marketing plans for the Center
			• Continue efforts in providing cross-referrals and outreach with CBOs

*** Green, bold, and italic items were completed since July 2001***

CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
Intake Initial basic information which is commonly collected by all program partners and all required activities up to the determination of eligibility *Provided to universal population*	• **Convene a workgroup that will research and develop a universal intake form that satisfies all requirements**	**Intake** • ***Completed the design and implementation of the intake form and customized intake process*** • ***Designed, installed, and piloted a swipe card data collection system for the Center. This system will track services used and provide detailed customer demographic information***	**Intake**
Orientation Information to the customers on partner programs, the One Stop system and Center services *Provided to universal population*	*** Develop and implement Power Point Orientation** • State-of-the-art presentation with digital images • For use by Center & System • For customer and staff orientation to the Center	**Orientation** • ***A daily staff assisted Orientation is being provided by the Universal Client Rep.*** • ***Orientation material and process has been put in place facilitating the distribution of information regarding partner programs, services, and the OneStop system***	**Orientation** • The self-assisted Orientation is being worked on by the Operations Committee and Customer Flow sub-committee
Universal Access Accessibility for the widest range of customers to information about services relating to their career, employment, training, and educational goals	*** Update and market One Stop Web site** • Development of Career Link web page that lives on OSSF site, maintained by Center staff • Modifications and enhancements to existing site • Staff training for site use and maintenance • Develop potential for communicating and posting info • Participate in the contribution of the system's web site *** Setup library facilities and services** *** Implement ADA improvements relating to programmatic and physical access to services**	**Universal Access** • Multilingual staff is available onsite • Staff qualified to assists various population such as welfare-to work, ex-offenders, low English proficiency are available onsite • ***Began to Put in place a full scale library of information about careers, training, education, employment, and workforce development topics, books, and materials*** • ***Installed an ADA compliant automatic entrance door*** • ***Designed and renovated staff and public restrooms to be ADA compliant*** • ***Leased two customer handicapped parking*** • ***Installed lobby phones with volume control and TTY phone for filing Unemployment Insurance (UI)*** • ***Designed and installed the Job listing boards to assist job seekers. The job listings are updated daily*** • ***Upgraded the ADA computer for Internet access capability*** • ***An ADA workgroup has been formed with representatives from CBOs and State agencies providing recommendations to help improve access to services for ADA customers***	**Universal Access** • ADA Work group is working on recommending a priority list of ADA improvements • ADA computer and software upgrade are being processed • Update specific information on the system's web site • Expand library hours and resources
Initial Assessment Determination of the customer's skill levels, aptitudes, and supportive services needs	**STAFF- Universal Client Rep -1 FTE** Provides one-on-one assistance to drop-in customers, including brief skill levels, aptitudes, and service to universal orientation to relevant services at the Center Supportive services needs	**Initial Assessment** • Workshops providing skill and aptitude assessments (e.g., PESCO, QWIZ, Reading Free, MOD C) are in place • ***Completed hiring of the Information and Referral Specialist, Universal Client Representative***	**Initial Assessment** • Include Initial Assessment information in the self-assisted Orientation • The Operations Committee

* *Green, bold, and italic items were completed since July 2001*

CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
Provided to universal population	customers. Provides assessment of skill level, aptitudes, abilities & supportive Provided to universal population service needs • Refers customer to self-assisted or staff-assisted core resources. Initiates intake process by entering customer record in common case management system • Refers customers to Universal Client Representative, if needed • Initiates follow-up services	***Receptionist, and the Computer Lab Specialist. These staff fills the gap in providing the services required by law and complements other partner services*** • ***Completed the purchase, installation, and administration process of the PESCO Job Skills software used in assessing Job Skill levels. Designed and implemented a sign up process for the Job Skills assessment*** • ***Developed and implemented the daily staff –assisted Orientation which includes information on initial assessment***	is researching a 'Barriers to Employment' Assessment program which will help customers to identify possible personal obstacles to employment

**** Green, bold, and italic items were completed since July 2001***

Required Services and Definitions	Recommended Action	Accomplishments	Work-In-Progress Improvements
Job Search, Job Placement, Counseling - **Job Search** Provision of Information and/or tools to help customers find a job - **Job Placement** Active staff involvement in directly connecting the job seeker to the employer - **Counseling** Staff provision of information and advice to a customer for the purpose of helping the customer make wise choices about education, training, and career choices	**STAFF -Universal Client Representative -1 FTE** - Expert on programs & supportive services available through system tools to help customers find a job - Assists in development of common system-wide referral process - Also acts as librarian for the Resource Room *** Develop common Information Resource/ Referral directory for system-wide use.** **Add Internal signage, more frequent workshops, & staff training** **Fortify Resource Room materials** - Videos, software, books, magazines, newspapers other **Assume annual licensing of career exploration software** - Choices and Eureka programs	**Job Search, Job Placement, Counseling** - Drop-in Advisors and schedules are available on site - Monthly and daily Job Workshop Schedules are posted and distributed at the Lobby - Career Counselors are available by appointment - Career exploration software such as Choices and Eureka are available - Workshops such as Resume Writing, Interview, Choices, PESCO, Job search the Internet Way, Job Readiness Workshops and others are in place - Computer with access to CalJobs and the Internet are available and onsite staff to assists with registration - ***Purchased and setup BRAIN and HelpLink directory for Center. The directory provides information on all the services available in the community.*** - ***An additional Job Placement Specialist has been put in place by partner staff to provide services to the Universal population*** - ***Purchased, organized and opened a complete workforce development library for customer use*** - ***Brochures have been developed and printed with all the information about the services provided at the Center*** - ***Completed hiring and training of the Universal Client Representative, Computer Lab Specialist, Information and Referral Specialist to assist customers on the use of available Job Search tools and assessment services at the Center or in the community*** - ***Designed and installed the internal signage listing all the information about the services provided at the Center*** - ***Information on job search, placement, and counseling services is provided in the daily staff assisted Orientation***	**Job Search, Job Placement, Counseling** - Include Job search, placement and counseling information in the self-assisted Orientation

** Green, bold, and italic items were completed since July 2001*

CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
Labor Market Information *Provided to universal population*	**Labor Market Information** • Integrate into Orientation and Center Resources • Signage and printed materials • Train staff	**Labor Market Information** • Labor Market Information is provided in the Jump Start Workshop, Steps Program/ Job Readiness Workshop in Spanish and Chinese • ***The Universal Client Representative began providing daily staff-assisted Orientation*** • ***Information on how to access LMI is provided in every Orientation given at the Center***	**Labor Market Information** • Include LMI service availability in the self-assisted Orientation
Information about local Training Programs - Performance and Cost	**Information about local Training Programs - Performance and Cost** • Integrate into Orientation and Center Resources • Signage and printed materials • Train staff	**Information about local Training Programs -Performance and Cost** • Performance Indicators provided by PIC to subcontractors and others in the training community • DHS CalWORKS Program has performance data available for their employment specialist • Information, fees and costs for CCSF programs are provided • PIC's Training program costs are available • Training costs for the State Department of Rehabilitation (DOR) program are available through the DOR counselor • ***Information about other employment training services throughout the community is available at the Center*** • ***ETPL list is available online (l-train.org) and hardcopy version at the Resource Desk*** • ***Information about all services is posted within the Resource Area*** • ***Center staff is available to assist customers in accessing information on local training programs***	**Information about local Training Programs - Performance and Cost** • Include information on Local Training Programs in the self-assisted Orientation
Information about local System Performance	**Information about local System Performance** • Integrate into Orientation and Center Resources • Signage and printed materials • Train staff	**Information about local System Performance** • Local performance measures are available from PIC • EDD and DHS sets program specific performance standards • ***The daily Orientation provides information on accessing local system performance***	**Information about local System Performance** • Include information on local system performance in the self-assisted Orientation • Additional Orientation sessions done by partner staff is being put in place
Supportive Services Informing customers of the types of services available, eligibility and method for access	**Supportive Services** • Develop common Information Resource/ Referral directory for system-wide use • Link to online resources through web site • Integrate into Orientation	**Supportive Services** • ***Information on additional services available in the community can also be found in the HelpLink and BRAIN directory***	**Supportive Services** • The self-assisted Orientation is being worked on by the Operations Committee and the Client

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CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
	• Signage and printed materials	• ***Center staff is available throughout the resource area to assist customers in using the services*** • ***Customers are able to link with online resources and other agencies with assistance from staff***	Flow sub-committee • Planning for an Information Window is in progress
Unemployment Insurance Claim	**Unemployment Insurance Claim** • Integrate into Orientation and Center Resources • Signage • Train staff	**Unemployment Insurance Claim** • Access to filing for Unemployment Insurance claim is available at the Center • Lobby staff is trained to direct appropriate customers to the location of this service and how to access it. • Unemployment Insurance Information brochures are provided to customers • ***Installed the Unemployment Insurance cubicles to provide customer privacy*** • ***Completed the purchase and installation of a TTY phone*** • ***Information about Unemployment Insurance can be found in the marketing brochure used by the Center and posted under the List of Services in the resource area*** • ***Developed the staff assisted Orientation to include information on Unemployment Insurance*** • ***Special staff have been provided by one of the partner for Unemployment Insurance phone assistance*** • ***Installed five (5) upgraded phones providing direct-dial to four (4) Unemployment Insurance language services***	**Unemployment Insurance Claim** • Include Unemployment Information in the self-assisted Orientation
Welfare-to-Work Information and Eligibility	**Welfare-to-Work Information and Eligibility** • Integrate into Orientation and Center Resources • Signage • Train staff	**Welfare-to-Work Information and Eligibility** • DHS Program staff onsite (e.g., Employment Service, Calworks) provide WTW services • ***Access to information on Welfare-to-work services is also available in the BRAIN and HelpLink directory*** • ***A complete list of services on welfare-to-work services is available on the menu of Center services and in the Orientation***	**Welfare-to-Work Information and Eligibility** • Include in the self-directed Orientation System information on WTW services • A process to facilitate WTW partners in providing WTW information in one of the lobby windows is being developed
Additional Critical Needs Directly related to the provision of required Services, needed to achieve and support full compliance and universal access	**STAFF -One Stop, Center Manager -1 FTE** • Manages operations of full service Center **STAFF -Administrative Assistant -1 FTE** • Provides support to Center Manager **STAFF -Computer Lab Specialist -1 FTE** • Provides customer assistance in computer lab • External signage and partner directory	**Additional Critical Needs** • ***Center Manager has been hired*** • ***The Center's external signage (Career Link Center – Mission) is shown in three (3) different languages*** • ***Established procedure for requesting equipment repairs, maintenance, upgrade, or new equipment***	**Additional Critical Needs**

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CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
	Technology Systems for Center within System * Case management / customer tracking system, with potential for swipe card system • Identify minimum level of tracking and implement in Center or upgrading computer. • Internet access for the Center computers • Additional costs to link Center to System network • Expand, upgrade, and maintain technical capacity	• ***Additional Center staff were hired to fill the gaps in providing the services required by law and complements other partner services*** • ***The swipe card data collection system is currently being used to track services used by customers and provide detailed customer demographic information*** • ***New PCs with Internet access for the CalJobs area were put in place*** • ***Assistance is provided by partner staff in using the CalJobs Website and in accessing the Unemployment Insurance service*** • ***Submitted to the State Library a Library Grant Proposal for the expansion of library resources***	
Customer Satisfaction Survey - required by WIA	**Customer Satisfaction** • Opinion Meter- equipment to survey customers In the Center • Develop customer surveys for mailing and posting on-line **Capacity Building** • Continuous improvement -implementation of process • Staff training and conferences • System training for staff, partners, and LWIB on One Stop and services Workforce Investment Act-related topics **Supplies** • Estimated list of supplies for one year available • Includes consumables for use by Center customers and staff **Equipment** • Purchase and install computers for customer and staff use for providing full array of core services • Rental and maintenance of other equipment for customer use in the Center, such as copy machine and printer • Should include additional computers for universal access, or equipment for ADA specialized equipment, as required by ADA **Furniture** • Furnish common Center areas, such as	**Customer Satisfaction Survey** • EDD has in place regular customer service satisfaction survey • ***Installed the customer feedback drop box and designed the suggestion/comment form*** • ***Completed the purchase, installation, and administration of the Customer Survey OpinionMeter***	

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CAREER LINK CENTER – MISSION OPERATIONAL PLAN FROM JULY 2001 TO FEBRUARY 2003

Required Services and Definitions	Recommended Action	Accomplishments	Work-in-Progress Improvements
	Resource Room and conference rooms, as needed		
Continuous improvement of service delivery system		**Continuous improvement of service delivery system** - A system to track supplies used by the Center is in place - Fax machine, printer, PCs, employer contact phones, copier are in operation for customer use - ***The Center's library is staffed by a librarian who is ready to help customers access information about careers, training, education, employment, and workforce development*** - ***Marketing materials with information about the services available at the Center were distributed to customers, CBOs, and other agencies*** - ***A staff development system for new partners to become knowledgeable with the Center activities and resources was put in place*** - ***Purchased two customer handicapped parking spaces*** - ***Developed an expenditure plan for the Center*** - ***Staff attended a three (3) day OneStop CWA Conference*** - ***Staff did an all day tour of three (3) OneStop Centers in the Bay Area*** - ***Staff Training performed by Greg Newton on the various OneStop Services*** - ***Purchased additional computers for customer use*** - ***A customized one day staff training by Larry Robins covered the principal concepts of the OneStop System and Center*** - ***Supervisory staff were trained in Greg Newton's OneStop leadership and business services*** - ***The Center staff standard ID badges*** - ***Configured and installed New PCs for CalJobs area*** - ***The Children's Playroom has been expanded in order to increase the number of children that can be accommodated while the parents are using the services at the Center*** - ***Upgraded many of the slower computers used by customers for job search and career/ skills assessments activities***	**Continuous improvement of service delivery system** - Additional training for staff and partners is being planned - Adequate space/facility is being planned for EDD - Additional staffing is needed in the Children's Playroom - Workshops, signage, and information in different languages is being developed

* *Green, bold, and italic items were completed since July 2001*

Career Link Center -Mission
February Customer Satisfaction Analysis

Total Surveys: 248 of 248
Report Date: 2/27/03

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1 Were all your questions and concerns addressed in a clear and friendly manner?

A.	Yes	**67.74%**
B.	No	18.15%
C.	Somewhat	14.11%

2 How did you find out about this center?

A.	Dropped by	**45.56%**
B.	Word of mouth	21.37%
C.	Had an Appointment	12.50%
D.	Flyer	0.81%
E.	Other	19.76%

3 What services did you primarily come for?

A.	Find a job	**59.27%**
B.	Appointment	3.23%
C.	Attend Workshop	3.63%
D.	File for Unemployment	11.69%
E.	Use Computers, Fax, Copier, Phone	8.47%
F.	Get Social Services	6.85%
G.	Find out about training	6.85%

4 If you're here to find a job, which services did you primarily use?

A.	Cal Jobs	29.44%
B.	Job posting in window	10.89%
C.	Internet	**30.65%**
D.	Talk to staff	8.87%
E.	Written Materials	2.42%
F.	Other	17.74%

5 Approximately how many times have you used our services in the past six months?

A.	First Time	28.63%
B.	2-10	**41.53%**
C.	11-25	16.94%
D.	Over 26	12.90%

6 Would you recommend the use of our services?

A.	Yes	**71.37%**
B.	No	11.69%
C.	Maybe	16.94%

*** This Survey was done using an OpinionMeter.**

Career Link Center -Mission
February Customer Satisfaction Analysis

Total Surveys: 248 of 248 **Date: 2/27/03**

7. Which Zip Code are you from?

Zip Code	No.	Zip Code	No.	Zip Code	No.	Zip Code	No.
0	37	00000	8	11111	1	21542	2
61241	2	64444	1	91939	1	94014	4
94015	2	94025	2	**94102**	**12**	94103	5
94107	6	**94109**	**13**	**94110**	**54**	94111	1
94112	9	94115	2	94116	6	94117	2
94118	4	94119	2	94121	4	94122	4
94124	**21**	94127	5	94131	4	94132	8
94134	**10**	94157	2	94160	2	94188	2
94360	2	94601	1	94951	2	95011	2
95015	1	99411	2		0		

94110 - Mission
94124 - Bayview
94109 - Tenderloin
94102 - Western Addition (801 Turk area)
94134 - Visitation Valley, Portola

*** This Survey was done using an OpinionMeter.**

APRIL 2003
CAREER LINK CENTER –MISSION
3120 MISSION STREET
SCHEDULE OF ACTIVITIES

Event / Workshop	Day	Starting Time	How Long	How to Access
S.M.A.R.T.E. STEP WAY				
TAKE THE S.M.A.R.T.E STEP • *The smart way to connect to job services and other resources*	*Monday through Friday*	*10:00 AM*	*1 hr.*	Call (415) 401-4950
JOB SEARCH WORKSHOP				
Jump Start Your Job Search • *Orient and organize your job search; target and find the right job*	*Thursday* *APRIL 3* *APRIL 17*	*9:00 AM*	*3.5 hrs.*	*Call (415)* *401-4946*
Best Ways to Find a Job • *Job seeking methods for the hidden job market*	*Thursday* *APRIL 24*	*6:00 PM*	*2 hrs.*	*Call (415)* *401-4805*
Job Search the Internet Way • *Get ideas for using the Internet as an effective job searching and career-changing tool*	*Monday* *APRIL 21*	*10:00 AM*	*2 hrs.*	*No reservation required, just be on time*
The Quick Job Search • *This workshop provides practical suggestions and a good overview of effective job hunting strategies.*	*Tuesday* *APRIL 29*	*1:00 PM*	*2 hrs.*	*No reservation required, just be on time*
Networking & You • *An Interactive Workshop Experience Access the hidden Job Market*	*Tuesday* *APRIL 15* *APRIL 22*	*10:00 AM* *1:00 PM*	*2 hrs.*	*No reservation required, just be on time*
COMPUTER WORKSHOP				
Windows Application • *Overview of Desktop*	*Thursday* *APRIL 24*	*6:00 PM*	*2 hrs*	*Call (415)* *401-4805*
MS Word Overview • *Overview of Microsoft Word*	*Thursday* *APRIL 3*	*6:00 PM*	*2 hrs*	*Call (415)* *401-4805*

WORKSHOP SCHEDULE SUBJECT TO CHANGE WITHOUT PRIOR NOTICE. PLEASE CALL TO CONFIRM. REVISED 4/23/2003.

Event /Workshop	Day	Starting Time	How Long	How to Access
COMPUTER WORKSHOP				
Personal Computer Overview • *Learn to use the PC mouse and keyboard, plus parts of the PC*	*Thursday* *APRIL 10*	*6:00 PM*	*2 hrs*	*Call (415) 401-4805*
Mail Merge • *Overview of merging MS Word documents.*	Thursday *APRIL 17*	*6:00 PM*	*2hrs*	*Call (415) 401-4805*
Basic Computer for Beginners • *Learn how the computer operates, mouse usage, and keyboarding*	Tuesdays	*9:00 AM*	*1 hr*	*Call (415) 401-4977*
The Internet and Email • *Learn Internet and Email Skills (Attendees must have basic computer skills)*	*Fridays*	*1:00 PM*	*2 hrs*	*Call (415) 401-4977*
MS Excel Overview • *Overview of Excel*	*Thursday* *APRIL 3* *APRIL 10*	*6:00 PM*	*2hrs*	*Call (415) 401-4805*
TRAINING INFORMATION WORKSHOP				
Training Information Workshop • *Information on free and low cost training programs*	Mondays	*9:00 AM*	*3 hrs.*	*No Appointment Needed - only be on time*
RESUME WORKSHOP				
Applications & Resumes • *Completion of master Application Tips on Resume writing*	*Thursday* *APRIL 17*	*6:00 PM*	*2 hrs.*	*Call (415) 401-4805*
Resume Writing • *Learn about resumes, cover letters and how to create/ update your own resumes*	*Friday* *APRIL 4* *APRIL 18*	*9:00 AM*	*2 hrs.*	*Call (415) 401-4956*

Event /Workshop	Day	Starting Time	How Long	How to Access
INTERVIEW WORKSHOP				
Interview for Success • *Learn to interview and how to answer the difficult questions*	*Wednesday* *APRIL 9* *APRIL 23*	*1:00 PM*	*3 hrs.*	*Call (415) 401-4956*
Interviewing Skills – Parts 1 & 2 • *This Workshop is directed at job seekers who are looking for professional jobs. This is a two-part series workshop.*	*Thursday* *APRIL 17 (Part 1)* *APRIL 24 (Part 2)*	*6:00 PM*	*2 hrs.*	*Call (415) 401-4805*
CAREER OPTION WORKSHOP				
Orientation to Career Assessment • *Explore your career options; schedule an assessment test that targets your next career path.*	*Mondays* *Wednesdays* *Fridays* ***No Orientation from 4/14 until 4/18/03***	*11:00 AM* *2:00 PM* *11:00 AM*	*1 hr.*	*No Appointment Needed - only be on time*
Choices • *Learn how to use this powerful Software for career development*	*Tuesday* *APRIL 1* *Monday* *APRIL 28*	*1:00 PM* *10:00 AM*	*2 hrs.*	*No reservation required, just be on time*
READING FREE Vocational Assessment • *A paper and pencil evaluation of learning ability and vocational interests for ESL-learners with limited English skills working with a career or employment specialist; English/Spanish/Cantonese/Vietnamese*	*Wednesdays* *Thursdays*	*12:45 PM* *8:45 AM*	*2 hrs.*	*Must first attend "Orientation to Career Assessment" Workshop*
APTICOM Vocational Assessment • *An electronic console-based evaluation of basic skills, vocational aptitudes, and interests with job match. Pre-requisite: minimum 5th grade reading level; ages 16-adult. This is a 2 part series workshop*	Mondays & Thursdays OR Tuesdays & Thursday	*1:15 PM* *OR* *8:45 AM*	*45 min. Orientation plus two, 3-hr workshops*	*Must first attend "Orientation to Career Assessment" Workshop*
OTHER				
Drop-in Advisor • *Walk in for a 15-minute session reviewing your resume, get interviewing or job search tips, Career change info.*	*For times and dates, see the APRIL 2003 Drop-in Advisor flyer*		*15 min.*	*Drop in and sign up*

WORKSHOP SCHEDULE SUBJECT TO CHANGE WITHOUT PRIOR NOTICE. PLEASE CALL TO CONFIRM. REVISED 4/23/2003.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: CUSTOMIZED TRAINING POLICY FRAMEWORK AND BUDGET SET-ASIDE RECOMMENDATIONS (AGENDA ITEM 5H)

BACKGROUND

Customized Training is defined in the Workforce Investment Act as training that is designed to meet the special requirements of an employer or a group of employers. Also, Customized Training may be provided for both unemployed persons seeking employment and employed persons hoping to improve their skills and advance toward self-sufficiency.

Customized Training may be directly provided by the employer in the form of On-the-Job Training or by a third party training provider either at the work site, training provider's site, or other location in the community. While customized training is expected to meet the special needs of a specific employer or group of employers, it may involve technology training, production or service procedure training, upgrading of skills, workplace literacy or other appropriate purposes identified by the Local Board. Also it is strongly recommended that investments in customized training target those employers that provide jobs in growth occupations as identified by the WISF Board.

If WIA funds are used for Customized Training, special conditions exist for both the employer and trainee. Employers must pay for at least one-half of the cost of the training and agree to hire or retain the trainee. Different eligibility criteria apply to trainees depending on whether they are employed or unemployed.

This memo is intended to inform your discussion through an outline on various policy implications regarding the implementation of a Customized Training Program.

History

At the April 25, 2002 Employer Services Committee meeting, committee members had a preliminary discussion on the concept of a local Customized Training Program.

At the end of the discussion, committee members arrived at the following consensus:

(A) Ask Program Resource Committee's (PRC) consideration to set aside a defined portion of the WIA funds for a rapid turnaround system for customized training with criteria to be developed by staff.

(B) Direct staff to prepare a recommendation to the Executive Committee concerning issue of "sole source" immediately. This "risk management" recommendation should inform the Committee of the potential cost, benefit, and options to mitigate risk if sole source procurement is used to acquire customized training. (See attached PIC and DOL correspondence related to the procurement of training providers.)

145 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

(C) Recommend that Executive Committee and Program Resource Committee examine all possible funding sources to fund customized training programs.

Policy Framework

At the March 26, 2003 meeting, the Employer Services Committee adopted the attached Customized Training Policy framework for your consideration.

Funding Set-Aside

At the January 15, 2003 meeting, the Employer Services Committee adopted the motion to recommend to the Executive Committee to set aside a minimum of $300,000 from **various sources of funds** to fund the Customized Training Program.

Benefits of Customized Training

1) Leverages private funds
2) Serves employers as customer
3) Assists participants to attain self-sufficiency, which fulfills Mayor's policy directive to the Board
4) Links to economic development to create new jobs in San Francisco, and assists in business attraction and retention
5) When Customized Training is used as Incumbent Worker Training, it creates new entry-level positions, as existing entry- level workers will advance to higher-level positions upon completion of training
6) Addresses gap (relative lack of employer-provided training for entry-level jobs compared to higher skilled occupations) as identified in Employer Provided Training[1] study by Kevin Stange
7) Provides new sources of revenue for training providers
8) Builds employer awareness of other one-stop system services
9) Builds employer services component of the one-stop system
10) Provides fee-for-service revenue opportunity for the entire system
11) Provides opportunity for employer and industry driven curriculum development

A 1998-1999 study by Isbell, Trutko, and Barnow on Customized Training cited the following advantages:

a. A high percentage of trainees complete training, in part because they are motivated by the possibility of jobs at the end of the training.
b. Almost everyone who successfully completes the training obtains full-time work in jobs paying at or above the JTPA[2] wage.
c. With appropriate training and other support services available through the JTPA program, retention rates for those entering training are high.
d. Training enhances the trainee's skills and long-term employability both at the firm that sponsored the training and with other firms.
e. Jobs are generally guaranteed if the trainee successfully completes training.
f. The jobs are generally full-time, paying at least the average JTPA wage, and often include fringe benefits and career advancement potential.

---

[1] http://www.picsf.org/research/misc2002/brief_10-02_er_training.pdf

[2] Job Training Partnership Act. This Act preceded the Workforce Investment Act.

Disadvantages of Customized Training

1) May divert limited resources from very low-income households to the employed but not yet self-sufficient.
2) Shift **portion** of burden of training cost for incumbent workers from employer to public system.
3) Training may be so customized as to limit transferability of skills.
4) Small firms may lack sufficient number of trainees to effectively participate in the program.
5) If training time is unpaid by employer, some low-income workers may not be able to participate.
6) Some firms are wary of partnership with government-funded programs, especially if there are time delays and extensive paperwork.

WIA Rules and Regulations

Customized training is defined under Section 101 (8) of the Workforce Investment Act (WIA) as follows:

(A) Training that is designed to meet the special requirements of an employer (including a group of employers);
(B) Training that is conducted with a commitment by the employer to employ or continue to employ an individual upon successful completion of the training; and
(C) Training for which the employer pays for not less than 50% of the cost of the training.

In addition to the definition, customized training shall be conducted in accordance to the following WIA Rules and Regulations (29 CFR 663.230 and 663.720):

(A) Customized training must relate to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by the Local Board
(B) Individual participants must be WIA eligible and enrolled, and if employed, have earnings that are less than self-sufficient as defined by the local workforce investment area.

RECOMMENDATION

(1) Adopt the attached Draft Policy for Customized Training and direct staff to undertake the development of procedures and resources necessary to implement a Rapid Turnaround Customized Training Program effective July 1, 2003.

(2) Set aside a minimum of $300,000 from various sources of funding for the Program in PY July 1, 2003 – June 30, 2004.

Attachment

PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
TITLE 1D YOUTH OPPORTUNITY GRANT (YOG)
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
163	**Inner-City Adolescent Network, Inc. Foundation** 3801 Third Street San Francisco, CA 94124 (415)806-3407	**ICAN** is a year-round program dedicated to youth guidance. ICAN will focus on "at risk" youth who have been incarcerated by or have had other contact with the juvenile justice system; youth who have been rejected by society and have difficulty with high truancy and youth who are from troubled or broken homes. ICAN will provide comprehensive guidance and counseling that promotes educational, social, vocational, cultural and character development. We seek to foster brotherly and sisterly relations, reduce the risk of ongoing criminal activity, and increase the awareness of individual academic and vocational abilities. ICAN will provide an array of youth development activities ranging from life skills training, community service/leadership development, academic tutoring support to job readiness training. The program schedule is from Monday - Friday from 3:30 pm to 8:45 pm, approximately 20 hrs/wk.	$3,500	**YES**
164	**Enterprise for High School Students** 450 Mission Street, Suite 408 San Francisco, CA 94103 (415)896-0909	**Career Compass**, a career and college counseling program, is designed to aid individuals in career choice through personal reflection, educational and occupational exploration, and decision making. The program will greatly benefit both persons who are having difficulties deciding on a future career path, and those who may want to confirm their occupation of choice. Participants meet with a counselor once a week for six weeks ranging from 12 - 20 hours with an additional bonus of 2 individual counseling sessions. The sessions are designed to take the individual through an extensive search of personal interests and exploration of career and educational choices.	$1,100 Individual rate or Group rate @ $500 per individual	**YES**
165	**Glide Foundation** 330 Ellis Street, #504 San Francisco, CA 94103 (415)674-6176	**Bay Area Construction Program (BACP)** will provide a 14-week hands-on pre-apprenticeship training program for eligible out-of-school youth 18-21 in the construction industry; fully endorsed by the unions, that covers such trades as: carpentry, cement masonry, electrical, ironwork, etc. The youth will earn 6 units of college credits upon successful completion of the program. Training is from 7am - 3:30 pm, Monday-Friday or evening classes from 6pm - 9pm. Certification courses in hazardous material handling, asbestos removal, lead abatement and confined spaces are included. Entry requirements are 18 yrs, have HS diploma or GED, have reliable housing, a minimum of 5th grade reading & math levels and clean & sober for at least 6 months. BACP will also provide after graduation basic tool set, sponsorship of union dues, ongoing case management, and job placement & retention services.	$5,150	**YES**
166		**Office Support Skills (OSS)** program will prepare eligible out-of-school youth 18-21 for entry level jobs in clerical and administrative fields earning $10-$15/hr. OSS will provide a 14 week computer based training in Microsoft Office Suite apllications (Word, Excel, PowerPoint, & Outlook Express), business correspondence format and style, use of business machines, Internet, etc. OSS will also provide job readiness training, case management, GED assistance, job placement and job retention services. Entry requirements are 18 yrs, have reliable housing and clean & sober for at least 6 months. After graduation, students will receive the 'Microsoft Office User Specialist's" (MOS) certification of computer skills which is recognized by employers as proof of proficiency in MS Office Suite.	$5,850	**YES**
167		**Tech Support** program will prepare eligible out-of-school youth 18-21 for entry level PC Technician & Technical Support jobs earning $12-20/hr. Youth will receive 20 wks of intensive classroom training to prepare them for such jobs as PC Repair Technician, Help Desk Specialist, System Administrator and more. Tech support will also provide job readiness, case management, GED assistance, job placement and job retention services. Entry requirements are 18 yrs, have reliable housing, a minimum of 9th grade reading & math levels and clean & sober for at least 6 months.After graduation, youth will receive 12 units of college credits and be eligible to take the A+ Certification Tests in hardware and software skills at no cost. This certification is recognized by employers as proof of proficiency in technical computer skills.	$6,150	**YES**

3/17/03

Customized Training Draft Policy – Final Revision - March 26, 2003

DRAFT POLICY	
(1) Employer shall make a good faith effort to hire (for Pre-Employment Training) or *advance* (for existing employee) trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b) *Employers and training providers will define the term "successful" up-front, and may include the employer's measure of skill attainment.* *Advancement may take the form of wage enhancement and/ or increase in job responsibilities for existing employees.*	(5) Customized training shall be conducted only in occupations that provide opportunity for advancement and self-sufficiency. (WIA Final Rule 663.230)
(2) For pre-employment training contracts, employer must pay for at least 50% of the training cost plus a negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715) (b) *In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee.* In-kind contribution to offset the employer's share may be allowed based on funding source requirement.	(6) For employed workers, customized training shall target low-skilled workforce as determined by wage level, basic skill deficient, language barrier, lacks High School Diploma, less than 1 year work experience, and other barriers to advancement. It shall also target high-skilled workers that are unemployed and need retraining, and the unemployed age 55 or over that are re-entering the workforce and need upgrade skills training. (Local Policy)
(3) Customized training shall be available to San Francisco and SFO businesses. (Local Policy)	(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas, such as the Enterprise Zone or the Federal Renewal Community. "Limited funds" shall be defined by the WISF Board. Customized Training resources shall be aligned, where possible and appropriate, with economic development. As job quality is the absolute standard, priority shall be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long-term growth within the company over the location of the businesses. (Local Policy)
(4) Customized training shall be related to employment opportunities or growth occupations identified by the Local Board. ("Linked to the Employment Opportunities in the Local Area…" WIA Sec 134 (4)(A) (iii)) *Jobs that provide the greatest opportunity for growth, and /or the greatest likelihood of full-time continued employment shall be considered for this service.*	(8) Training providers shall be identified through a continuous and open process that to the greatest extent allows for rapid turnaround and employer's choice. Consistent with federal contracting requirements. Employer will make the final selection of the training provider, consistent with this policy. Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Selection criteria will include, but not limited to the organization's ability to receive federal funds, cleared of any federal fraud convictions, and Equal Opportunity Employer. Priority shall be given to San Francisco trainers. (Local Policy)

DRAFT POLICY	
(9) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board. A self-sufficiency standard will need to be adopted by the WISF Board. (WIA Final rule 663.720)	(14) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) funds, (3) Pell Grants, and (4) WIA funds (Local Policy) *To complement the Rapid Turnaround concept, WIA Adult Funds may need to be used up-front to pay for the training when reasonable and appropriate and be reimbursed by other eligible sources of funding, even though the trainee is eligible for other sources of funding.*
(10) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes. (Local Policy) Project will be evaluated on employers' and trainees' satisfaction, completion rate, trainees' passed competency tests administered by companies if appropriate, retention rate, and wage after training. Labor market needs and data on impact on employers' recruitment cost, retention, turnover and staffing pattern change shall also be gathered. Staff shall report these data to the Board on a quarterly basis and a more comprehensive report to the Employer Services Committee on a quarterly basis.	(15) The Board shall reserve the right to deny customized training funding to anyone, if the service is deemed cost ineffective. (Local Policy)
(11) In instances where the employer pays 100% of the training costs, policies (3), (4), and (6) are waived. (Local Policy)	(16) Once the training provider, the employer, and the PIC, Inc. have agreed that there is a need to develop a training curriculum, the approval for funding for the project shall be no longer than 30 days. (Local Policy)
(12) Customized training trainees shall make a good faith effort to advance to higher skilled jobs after successful completion of training. (Local Policy)	
(13) Customized training shall be accessible through the one-stops, or coordinated through training providers, or partner agencies of the WISF network. (Local Policy) *The program shall be designed using a multi-faceted approach on how the employers are engaged.*	

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EXECUTIVE COMMITTEE **DATE:** MARCH 12, 2003

FROM: BRIAN MURPHY, PROGRAM RESOURCES COMMITTEE (PRC)

SUBJECT: SELF-SUFFICIENCY DEFINITION AND WIA ADULT PRIORITY OF SERVICES PLAN RECOMMENDATIONS (AGENDA ITEM #5I)

The WISF Board is asked to adopt a revised definition of Self-Sufficiency, and to approve a priority of services plan for Program Year (PY) 03 WIA Adult funds.

The Executive Committee met today, solicited public testimony, reviewed, and approved the recommendations on priorities for WIA Adult funds.

Background

A workgroup comprised of PRC and community members and PIC and DHS staff met on December 12th, January 8th and January 16th. Each meeting was scheduled for three hours. Meeting information was sent to all PRC and Committee of Community Agencies (CCA) members, PIC and DHS staff. It was also posted on PIC's web site. Attachment 1 contains the names and titles of attendees of one or more of the three meetings.

The meetings were facilitated by two PIC staff persons who led the discussion, but did not participate, per se. Two main questions were addressed:

1. Should the WISF use WIA Adult funds to provide intensive and training services to people whose income is above the WIA low-income ceiling?
2. Should the WISF expand or maintain the proportion of Individual Referrals (IR) funded with WIA Adult dollars?

Currently, San Francisco is using WIA Adult funds to provide intensive and training services only to persons at or below the WIA low-income ceiling, which is the highest of either 70% of the Lower Living Standard Income Level (LLSIL) or the poverty guidelines. Those levels as they are calculated currently for San Francisco, are in the following table.

	Family Size						
	1	2	3	4	5	6	Each Add'l
70% LLSIL							
Annual	$8,570	$14,040	$19,270	$23,790	$28,080	$32,840	$4,760
Poverty Guidelines							
Annual	$8,860	$11,940	$15,020	$18,100	$21,180	$24,260	$3,080

There is a Self-Sufficiency Standard (SSS) for San Francisco (and other locales) developed and calculated by Wider Opportunities for Women. The complete SSS for San Francisco is

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
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Attachment 2 to this memo. SSS incomes by family size are substantially higher than the 70% LLSIL/Poverty levels.

Discussion of Issues

The discussions were long, far-ranging and thoughtful. We would like to serve everyone who needs our assistance, but we realize that funds are limited. We also realize that the WIA definition of "low income" for San Francisco is absurd. Our policies should reflect that. The taskforce also identified processes and parts of the workforce development system that need to be improved before we can move forward with expanded customer choice. Community-Based Organizations also have concerns about the unpredictability of funding for their programs in an IR system. The workgroup's list of pros and cons of using WIA Adult funds to provide intensive and training services to people whose income is above the WIA low-income ceiling is Attachment 3 to this memo. Since a consumer choice "exception to the rule" that permits local areas to use contracts for services in lieu of Individual Training Accounts (ITAs), or in San Francisco-speak "IRs", limits those contracts to "special populations of low-income (as defined by the WIA) adults with multiple barriers", IRs will have to be used to serve those who are not considered "low-income" by the WIA definition. The Final PY 2002 Adult Allocation Budget is attached for your information (Attachment #4).

Recommendations

The following recommendations implicitly or explicitly take into account the statutory requirements to provide employment and training opportunities to those "most in need" [WIA Sec.195 (1)], to limit the provision of training services to "individuals who are unable to obtain other grant assistance" [WIA Sec. 134 (B)], and to give priority to "recipients of public assistance and other low income individuals for intensive and training services" [WIA Sec. 134 (E)].

The Executive Committee recommends the following:

1. That the WISF Board adopts the Self-Sufficiency Standard (SSS) for San Francisco developed and calculated by Wider Opportunities for Women as the eligibility criteria for WIA Adult funds for intensive and training services, and amends the Five Year Strategic Plan to reflect the changed definition of Self-Sufficiency.
2. That 85% of the PY 2003 WIA Adult funds available for intensive and training services be set aside to serve "special populations of low income adults with multiple barriers" through competitively procured cost reimbursement subcontracts.
3. That 5% of the PY 2003 WIA Adult funds available for intensive and training services be set aside to serve low income (as defined by the WIA) adults through individual referral subcontracts.
4. That 10% of the PY 2003 WIA Adult funds available for intensive and training services be set aside for individual referral subcontracts to serve adults whose incomes are between the low-income level as defined by the WIA and 75% of the San Francisco Self-Sufficiency Standard.
5. Those mechanisms be put in place to safeguard against denying services to low income adults while serving those above the WIA-defined low income level. Expenditures should be closely monitored and funds transferred to services for low-income adults if demand for intensive and training services by these individuals exceeds the planned 90% of funds.
6. That the IR and One Stop system processes be reviewed and improved, including case management processes to determine that prospective WIA clients are unable to obtain other forms of grant assistance or that it is not feasible for them to do so.
7. That an RFP be issued for PY 2003 on a one-year pilot-basis to test these new policies and subsequent new processes.
8. That the percentages and service priority policies be reviewed, and if necessary, revised every year.

In forwarding these recommendations to the WISF Board, the Executive Committee also wishes to suggest the following two things:

- First, that the One Stop process pay particular attention to the effective use of other sources (of funds) for clients.

- Secondly, that the Executive Committee would not support the further reduction of WIA funds for other program uses absent an effective demonstration of the efficiency and productivity of those uses.

If you have any questions about these recommendations prior to the April 30th meeting, please call Karen Hart, at 923-4260.

Attachments

Attachment 1

Attendee List for PRC Workgroup on Priorities for WIA Adult Funds

NAME	TITLE	OTHER
Tony Lugo	Employment Services Director, DHS	Staff of the Program Resources Committee (PRC)
Terri Feeley	Executive Director, SFWorks	PRC Member
Mark Mak	Project Manager, Self-Help for the Elderly	
Henry Lau	Project Director, Self-Help for the Elderly	
Donna Feingold	Executive Director, Toolworks	Co-Chair of Committee of Community Agencies (CCA)
Gwen Henry	Dir. Young Parents Ctr., Florence Crittenton Services	
Barry Hermanson	Director, Hermanson Employment Services	PRC Member
Gerry Souzis	Employment Services Coord., Catholic Charities	CCA Steering Committee Member
Bill Rosenberg	Contracts Compliance, Asian Neighborhood Design	
Kevin Stange	Research Analyst, Dept. of Human Services (DHS)	
Wes Dixon	Planner, Private Industry Council (PIC)	
Karen Hart	Refugee Program Coordinator, PIC	Staff of the Program Resources Committee (PRC)
Bob Schwab	Vice President of Youth Programs, PIC	
Craig King	Executive Director, SF Vocational Services	
Joel Streicker	Caregiver Trng Initiative Coord., PIC	Meeting Co-Facilitator
Cathy deCristofaro	One Stop System Coord., PIC	Meeting Co-Facilitator
Lucia Hughes	Business Services Mgr., PIC	
Steve Weaver	Contract Administrator, PIC	WIA Adult IR Program Staff
Elizabeth Toups	Director of Programs, Jewish Vocational Service	
Magdalena Campos	Employment & Training Specialist, PIC	WIA Dislocated Workers' IR Program Staff

Attachment 2

PROS

Helping the not-so-poor or nearly destitute	**Serve more [of the] needy people**	**Respond to employer needs**	**WIA poverty standard ≠ Cost of living in S.F.**	**More customer choice**	**Will be more effective with $$ spent**	**Implications for subcontractors $$ for multiple barriers**
Working poor served, skills & motivation, break cycle	Widens the pool of people served	Greater employer benefit	Easier eligibility requirements		Force more efficient use of funds (both WIA & non-WIA)	
Makes statement that “working poor matter”	WIA mandate to serve the universal population	Satisfy business’ need for qualified workers				
Helps the working poor	Other resources for those below					
More career advancement and self-sufficiency	Few in S.F. qualify					

Miscellaneous comments:

Do we have a list of the broad groups currently being served? What about the “impact” issue? Meaning, who won’t we be able to serve as a result of decreased funding?
What information do we have about systems and processes in other areas? Can we look at best practices in similar urban areas?

CONS

Act says "Most in need"	**"Creaming"**	**Less customer choice**	**Limited resources**	**MOE displace?**	**Mainstream training available to upper income**	
How to priotitize the poorest in this broader pool	"Creaming" – leaving hardest-to-serve behind		If $ is limited, why broaden the pool?			
Prioritize most in need			$$ should be used to serve the neediest			
What happens to people with most barriers who lose services?			Wrong message to USDOL re: need			
Consistent to the neediest						
Only $ for less poor who can't access other $$						

Miscellaneous comments:

About make-up of the group - Is the business community adequately represented at this meeting? Do we have their position represented? How can we get business to the table?

About IRs vs subcontracts – Don't we need to answer this question first? Concerning existing IR's, have we looked at the underlying issues, e.g. the admin burden? What is the concept vs the reality of having an IR (ITA) system in place? Is the problem with the process? What are the difficulties with unfilled training in slots in current contracts? How do we get accurate unbiased information about unfilled training slots?

Attachment 3

Table 38□The Self-Sufficiency Standard for San Francisco County 2000 - San Francisco CA PMSA.

	One Adult	*One Adult, One Child*			
Monthly Costs	***Adult***	***Adult + infant***	***Adult + preschooler***	***Adult + schoolage***	***Adult + teenager***
Housing	1,077	1,362	1,362	1,362	1,362
Child Care	0	846	847	380	0
Food	164	241	249	291	308
Transportation	35	35	35	35	35
Health Care	101	247	223	223	252
Miscellaneous	138	273	272	229	196
Taxes	383	760	753	566	444
Earned Income Tax Credit (-)	0	0	0	0	0
Child Care Tax Credit (-)	0	-40	-40	-40	0
Child Tax Credit (-)	0	-42	-42	-42	-42
Self-Sufficiency Wage 2000 Hourly	$10.78	$20.92	$20.79	$17.07	$14.52
Monthly, 2000	$1,896.81	$3,681.88	$3,658.94	$3,004.96	$2,555.03
Annual, 2000	$22,761.72	$44,182.50	$43,907.31	$36,059.47	$30,660.41
UPDATED Self-Sufficiency Wage 2002 Hourly	**$11.42**	**$22.17**	**$22.04**	**$18.10**	**$15.39**
Monthly, 2002	**$2,010.62**	**$3,902.79**	**$3,878.48**	**$3,185.25**	**$2,708.34**
Annual, 2002	**$24,127.42**	**$46,833.45**	**$46,541.75**	**$38,223.04**	**$32,500.03**

Wages have been updated using Consumer Price Index for October 2002. Costs reflect 2000 figures.

75% - Annual	$18,096	$35,125	$34,906	$28,667	$24,375
per hour	$8.70	$16.89	$16.78	$13.78	$11.72

One Adult, Two Children

Adult + infant infant	**Adult + infant preschooler**	**Adult + infant schoolage**	**Adult + infant teenager**	**Adult + preschooler preschooler**	**Adult + preschooler schoolage**	**Adult + preschooler teenager**	**Adult + schoolage schoolage**
1,362	1,362	1,362	1,362	1,362	1,362	1,362	1,362
1,692	1,693	1,226	846	1,694	1,227	847	760
317	325	365	381	333	372	389	412
35	35	35	35	35	35	35	35
293	269	269	298	246	246	275	246
370	368	326	292	367	324	291	282
1,367	1,354	963	757	1,340	933	750	692
0	0	0	0	0	0	0	0
-80	-80	-80	-40	-80	-80	-40	-80
-83	-83	-83	-83	-83	-83	-83	-83
$29.96	$29.79	$24.90	$21.86	$29.62	$24.64	$21.73	$20.60
$5,272.52	$5,242.90	$4,382.77	$3,848.18	$5,213.27	$4,335.81	$3,825.32	$3,625.45
$63,270.24	$62,914.74	$52,593.25	$46,178.11	$62,559.25	$52,029.70	$45,903.82	$43,505.35
$31.75	**$31.58**	**$26.40**	**$23.18**	**$31.40**	**$26.11**	**$23.04**	**$21.84**
$5,588.87	**$5,557.47**	**$4,645.74**	**$4,079.07**	**$5,526.07**	**$4,595.96**	**$4,054.84**	**$3,842.97**
$67,066.45	**$66,689.63**	**$55,748.84**	**$48,948.79**	**$66,312.80**	**$55,151.48**	**$48,658.05**	**$46,115.68**

$50,300	**$50,017**	**$41,812**	**$36,712**	**$49,735**	**$41,364**	**$36,494**	**$34,587**
$24.18	**$24.05**	**$20.10**	**$17.65**	**$23.91**	**$19.89**	**$17.55**	**$16.63**

		One Adult, Three Children				
Adult + schoolage teenager	Adult + teenager teenager	Adult + infant infant infant	Adult + infant infant preschooler	Adult + infant infant schoolage	Adult + infant infant teenager	Adult + infant preschooler preschooler
1,362	1,362	1,868	1,868	1,868	1,868	1,868
380	0	2,538	2,539	2,072	1,692	2,540
429	445	385	392	430	446	400
35	35	35	35	35	35	35
275	304	339	316	316	344	292
248	215	516	515	472	439	513
556	433	2,519	2,505	2,113	1,807	2,492
0	0	0	0	0	0	0
-40	0	-80	-80	-80	-80	-80
-83	-83	-125	-125	-125	-125	-125
$17.96	$15.40	$45.43	$45.26	$40.35	$36.51	$45.08
$3,160.95	$2,709.84	$7,995.53	$7,965.17	$7,101.23	$6,425.91	$7,934.81
$37,931.45	$32,518.12	$95,946.39	$95,582.07	$85,214.73	$77,110.94	$95,217.76
$19.04	**$16.32**	**$48.15**	**$47.97**	**$42.77**	**$38.70**	**$47.79**
$3,350.61	**$2,872.43**	**$8,475.26**	**$8,443.08**	**$7,527.30**	**$6,811.47**	**$8,410.90**
$40,207.33	**$34,469.21**	**$101,703.17**	**$101,317.00**	**$90,327.61**	**$81,737.59**	**$100,930.82**

$30,156	**$25,852**	**$76,277**	**$75,988**	**$67,746**	**$61,303**	**$75,698**
$14.50	**$12.43**	**$36.67**	**$36.53**	**$32.57**	**$29.47**	**$36.39**

SF

Adult + infant preschooler schoolage	Adult + infant preschooler teenager	Adult + infant schoolage schoolage	Adult + infant schoolage teenager	Adult + infant teenager teenager	Adult + preschooler preschooler preschooler	Adult + preschooler preschooler schoolage	Adult + preschooler preschooler teenager
1,868	1,868	1,868	1,868	1,868	1,868	1,868	1,868
2,073	1,693	1,606	1,226	846	2,541	2,074	1,694
437	453	475	491	507	407	445	460
35	35	35	35	35	35	35	35
292	321	292	321	350	269	269	298
471	437	428	394	361	512	469	436
2,100	1,793	1,708	1,401	1,128	2,478	2,086	1,780
0	0	0	0	0	0	0	0
-80	-80	-80	-80	-40	-80	-80	-80
-125	-125	-125	-125	-125	-125	-125	-125
$40.18	$36.34	$35.27	$31.43	$28.01	$44.91	$40.00	$36.17
$7,070.87	$6,395.55	$6,206.92	$5,531.61	$4,928.95	$7,904.45	$7,040.51	$6,365.19
$84,850.41	$76,746.62	$74,483.07	$66,379.28	$59,147.42	$94,853.44	$84,486.10	$76,382.31
$42.59	**$38.52**	**$37.38**	**$33.32**	**$29.69**	**$47.61**	**$42.40**	**$38.34**
$7,495.12	**$6,779.28**	**$6,579.34**	**$5,863.50**	**$5,224.69**	**$8,378.72**	**$7,462.94**	**$6,747.10**
$89,941.44	**$81,351.42**	**$78,952.05**	**$70,362.03**	**$62,696.27**	**$100,544.65**	**$89,555.26**	**$80,965.25**

$67,456	**$61,014**	**$59,214**	**$52,772**	**$47,022**	**$75,408**	**$67,166**	**$60,724**
$32.43	**$29.33**	**$28.47**	**$25.37**	**$22.61**	**$36.25**	**$32.29**	**$29.19**

							Two Adults
Adult + preschooler schoolage schoolage	***Adult + preschooler schoolage teenager***	***Adult + preschooler teenager teenager***	***Adult + schoolage schoolage schoolage***	***Adult + schoolage schoolage teenager***	***Adult + schoolage teenager teenager***	***Adult + teenager teenager teenager***	***2 Adults***
1,868	1,868	1,868	1,868	1,868	1,868	1,868	1,077
1,607	1,227	847	1,140	760	380	0	0
483	498	514	521	536	552	568	322
35	35	35	35	35	35	35	70
269	298	327	269	298	327	355	260
426	393	359	383	350	316	283	173
1,694	1,388	1,114	1,302	996	782	637	374
0	0	0	0	0	0	0	0
-80	-80	-40	-80	-80	-40	0	0
-125	-125	-125	-125	-125	-125	-125	0
$35.09	$31.26	$27.83	$30.19	$26.35	$23.27	$20.57	$6.47
$6,176.56	$5,501.25	$4,898.59	$5,312.62	$4,637.30	$4,095.02	$3,620.87	$2,276.00
$74,118.75	$66,014.96	$58,783.11	$63,751.41	$55,647.62	$49,140.20	$43,450.47	$27,311.99
$37.20	**$33.13**	**$29.50**	**$32.00**	**$27.93**	**$24.66**	**$21.81**	**$6.85**
$6,547.16	**$5,831.32**	**$5,192.51**	**$5,631.37**	**$4,915.54**	**$4,340.72**	**$3,838.13**	**$2,412.56**
$78,565.88	**$69,975.86**	**$62,310.09**	**$67,576.49**	**$58,986.48**	**$52,088.61**	**$46,057.50**	**$28,950.71**

$58,924	**$52,482**	**$46,733**	**$50,682**	**$44,240**	**$39,066**	**$34,543**	**$21,713**
$28.33	**$25.23**	**$22.47**	**$24.37**	**$21.27**	**$18.78**	**$16.61**	**$10.44**

SF

Two Adults, One Child				Two Adults, Two Children			
2 Adults + infant	2 Adults + preschooler	2 Adults + schoolage	2 Adults + teenager	2 Adults + infant infant	2 Adults + infant preschooler	2 Adults + infant schoolage	2 Adults + infant teenager
1,362	1,362	1,362	1,362	1,362	1,362	1,362	1,362
846	847	380	0	1,692	1,693	1,226	846
394	402	442	459	459	466	504	519
70	70	70	70	70	70	70	70
306	283	283	312	352	329	329	358
298	296	254	220	393	392	349	316
784	778	596	473	1,154	1,141	922	772
0	0	0	0	0	0	0	0
-40	-40	-40	0	-80	-80	-80	-40
-42	-42	-42	-42	-83	-83	-83	-83
$11.30	$11.24	$9.39	$8.11	$15.11	$15.03	$13.06	$11.70
$3,979.20	$3,956.34	$3,304.76	$2,853.65	$5,319.14	$5,289.48	$4,598.76	$4,119.77
$47,750.38	$47,476.10	$39,657.17	$34,243.84	$63,829.69	$63,473.78	$55,185.11	$49,437.19
$11.98	**$11.91**	**$9.95**	**$8.59**	**$16.02**	**$15.93**	**$13.85**	**$12.41**
$4,217.95	**$4,193.72**	**$3,503.05**	**$3,024.87**	**$5,638.29**	**$5,606.85**	**$4,874.68**	**$4,366.95**
$50,615.40	**$50,324.66**	**$42,036.60**	**$36,298.47**	**$67,659.48**	**$67,282.21**	**$58,496.21**	**$52,403.43**

$37,962	**$37,744**	**$31,527**	**$27,224**	**$50,745**	**$50,462**	**$43,872**	**$39,303**
$18.25	**$18.15**	**$15.16**	**$13.09**	**$24.40**	**$24.26**	**$21.09**	**$18.90**

SF

						2Adults, 3 Children
2 Adults + preschooler preschooler	***2 Adults + preschooler schoolage***	***2 Adults + preschooler teenager***	***2 Adults + schoolage schoolage***	***2 Adults + schoolage teenager***	***2 Adults teenager teenager***	***2 Adults infant infant infant***
1,362	1,362	1,362	1,362	1,362	1,362	1,868
1,694	1,227	847	760	380	0	2,538
473	511	527	549	565	580	514
70	70	70	70	70	70	70
306	306	334	306	334	363	398
390	348	314	305	271	238	539
1,128	916	765	707	579	456	2,275
0	0	0	0	0	0	0
-80	-80	-40	-80	-40	0	-80
-83	-83	-83	-83	-83	-83	-125
$14.94	$13.00	$11.64	$11.06	$9.77	$8.48	$22.72
$5,259.82	$4,575.34	$4,096.34	$3,894.74	$3,438.08	$2,985.78	$7,997.07
$63,117.87	$54,904.02	$49,156.11	$46,736.93	$41,256.96	$35,829.37	$95,964.88
$15.84	**$13.78**	**$12.34**	**$11.73**	**$10.35**	**$8.99**	**$24.08**
$5,575.41	**$4,849.86**	**$4,342.12**	**$4,128.43**	**$3,644.36**	**$3,164.93**	**$8,476.90**
$66,904.95	**$58,198.26**	**$52,105.47**	**$49,541.14**	**$43,732.38**	**$37,979.13**	**$101,722.77**

$50,179	$43,649	$39,079	$37,156	$32,799	$28,484	$76,292
$24.12	$20.99	$18.79	$17.86	$15.77	$13.69	$36.68

2 Adults + infant infant preschooler	*2 Adults + infant infant schoolage*	*2 Adults + infant infant teenager*	*2 Adults + infant preschooler preschooler*	*2 Adults + infant preschooler schoolage*	*2 Adults + infant preschooler teenager*	*2 Adults + infant schoolage schoolage*
1,868	1,868	1,868	1,868	1,868	1,868	1,868
2,539	2,072	1,692	2,540	2,073	1,693	1,606
521	557	572	528	564	579	600
70	70	70	70	70	70	70
375	375	404	352	352	381	352
537	494	461	536	493	459	450
2,260	1,867	1,560	2,246	1,853	1,545	1,459
0	0	0	0	0	0	0
-80	-80	-80	-80	-80	-80	-80
-125	-125	-125	-125	-125	-125	-125
$22.63	$20.17	$18.24	$22.54	$20.08	$18.15	$17.61
$7,965.98	$7,098.21	$6,421.31	$7,934.88	$7,067.12	$6,390.22	$6,199.35
$95,591.75	$85,178.55	$77,055.76	$95,218.61	$84,805.42	$76,682.62	$74,392.22
$23.99	**$21.38**	**$19.34**	**$23.89**	**$21.28**	**$19.24**	**$18.67**
$8,443.94	**$7,524.11**	**$6,806.59**	**$8,410.98**	**$7,491.15**	**$6,773.63**	**$6,571.31**
$101,327.25	**$90,289.27**	**$81,679.10**	**$100,931.73**	**$89,893.74**	**$81,283.58**	**$78,855.76**

$75,995	**$67,717**	**$61,259**	**$75,699**	**$67,420**	**$60,963**	**$59,142**
$36.54	**$32.56**	**$29.45**	**$36.39**	**$32.41**	**$29.31**	**$28.43**

SF

2 Adults + infant schoolage teenager	***2 Adults + infant teenager teenager***	***2 Adults + preschooler preschooler preschooler***	***2 Adults + preschooler preschooler schoolage***	***2 Adults + preschooler preschooler teenager***	***2 Adults preschooler schoolage schoolage***	***2 Adults preschooler schoolage teenager***	***2 Adults + preschooler teenager teenager***
1,868	1,868	1,868	1,868	1,868	1,868	1,868	1,868
1,226	846	2,541	2,074	1,694	1,607	1,227	847
615	630	535	571	586	607	622	637
70	70	70	70	70	70	70	70
381	409	328	328	357	328	357	386
416	382	534	491	458	448	414	381
1,168	997	2,232	1,838	1,531	1,446	1,140	990
0	0	0	0	0	0	0	0
-80	-40	-80	-80	-80	-80	-80	-40
-125	-125	-125	-125	-125	-125	-125	-125
$15.73	$14.31	$22.45	$19.99	$18.07	$17.53	$15.61	$14.24
$5,538.27	$5,038.14	$7,903.79	$7,036.02	$6,359.12	$6,169.18	$5,493.92	$5,014.15
$66,459.30	$60,457.66	$94,845.48	$84,432.28	$76,309.49	$74,030.17	$65,927.04	$60,169.76
$16.68	**$15.17**	**$23.80**	**$21.19**	**$19.15**	**$18.58**	**$16.54**	**$15.10**
$5,870.57	**$5,340.43**	**$8,378.02**	**$7,458.19**	**$6,740.67**	**$6,539.33**	**$5,823.56**	**$5,315.00**
$70,446.86	**$64,085.11**	**$100,536.21**	**$89,498.22**	**$80,888.06**	**$78,471.98**	**$69,882.67**	**$63,779.95**

$52,835	**$48,064**	**$75,402**	**$67,124**	**$60,666**	**$58,854**	**$52,412**	**$47,835**
$25.40	**$23.11**	**$36.25**	**$32.27**	**$29.17**	**$28.30**	**$25.20**	**$23.00**

2 Adults + schoolage schoolage schoolage	*2 Adults + schoolage schoolage teenager*	*2 Adults + schoolage teenager teenager*	*2 Adults + teenager teenager teenager*
1,868	1,868	1,868	1,868
1,140	760	380	0
643	658	673	688
70	70	70	70
328	357	386	415
405	371	338	304
1,093	931	781	644
0	0	0	0
-80	-80	-40	0
-125	-125	-125	-125
$15.18	$13.67	$12.30	$10.98
$5,342.41	$4,810.82	$4,330.61	$3,864.41
$64,108.92	$57,729.87	$51,967.29	$46,372.90
$16.09	**$14.49**	**$13.04**	**$11.64**
$5,662.95	**$5,099.47**	**$4,590.44**	**$4,096.27**
$67,955.46	**$61,193.66**	**$55,085.33**	**$49,155.27**

$50,967	**$45,895**	**$41,314**	**$36,866**
$24.50	**$22.06**	**$19.86**	**$17.72**

Current Budget, WIA Adult Formula Allocation

Attachment 4

REVENUE	Allocation $
PY'2002-03 WIA Adult Formula Allocation	2,012,692
Carry-in from Prior Year (FIFO)	235,000
TOTAL, PY'2002 GRANT REVENUE =	**2,247,692**

EXPENSE — SYSTEM OVERHEAD	Setaside $	
PIC Administration	201,269	*One Stop*
PIC Operations & Management	301,904	*System*
One Stop Center Compliance (Operator Consortium)	217,269	*Support*
One Stop System Technology (Adult Formula share of 200k)	64,809	*& Dev.*
Subtotal =	**785,251**	

INTENSIVE AND TRAINING SERVICES

EXPENSE — OCCUPATIONAL TRAINING	Subcontract $	Part. #
Computer & Office Technology		
Mission Lang. & Voc. School (MLVS)	86,945	29
Intercultural Institute of California (IIC)	102,350	27
San Francisco Vocational Services (SFVS)	52,959	11
Construction & Cabinet Making		
Asian Neighborhood Design (AND)	67,671	17
Young Community Developers (YCD)	65,666	15
Food Preparation Service		
Haight Ashbury Food Program (HAFP)	47,693	10
Health Careers		
Self Help for the Elderly (SHE-HHA)	34,652	9
Arriba Juntos (AJ)	96,906	24
Housekeeping		
Self-Help for the Elderly (SHE)	156,401	42
Subtotal =	**711,243**	**184**

EXPENSE — ON THE JOB TRAINING	Subcontract $	Part. #
Various Occupations		
No. Calif. Service League (NCSL)	84,705	24
Arriba Juntos (AJ)	84,277	29
Swords to Plowshares (STP)	65,461	19
Pool - OJT (Employer Wage Match/Reimbursement)	178,500	
Subtotal =	**412,943**	**72**

EXPENSE — INDIVIDUAL REFERRALS (ETPL)	Subcontract $	Part. #
Various Occupations		
Pool - Individual Referral Subcontracts (One Stop)	**125,000**	**25**

EXPENSE — PARTICIPANT SUPPORT COSTS	Setaside $	
Pool - Participant Support (Child Care, Transportation)	**213,256**	
TOTAL, PY'2002 GRANT EXPENSE =	**2,247,693**	**281**

REVENUE minus EXPENSE = (1)

*[Allocations history: PY'00-01 **$2,102,809**; PY'01-02 **$1,908,004**; PY'02-03 = **$2,012,692**.]*

1/27/03

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PLANNING CONSIDERATIONS FOR REFUGEE PROGRAMS (AGENDA ITEM 5J)

The Workforce Investment San Francisco (WISF) Board is asked to approve a development plan for FY 2002 Refugee formula funds.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

Background

Two years ago, the Private Industry Council of San Francisco, Inc. (PIC) issued a Request For Proposals (RFP) for organizations interested in providing employment and training services for refugees, and/or acculturation and social adjustment services for older refugees. In response to that RFP, we received eleven proposals from seven organizations. The PIC is currently funding five agencies to provide employment services (ES), vocational training (VT), acculturation services, and a central intake point (CIP). Our current FY 2002 budget for these programs and supportive services such as childcare and transportation totals $589,578, including FY 2001 carry forward funds. (This compares to $835,505 for FY 2001 including carry forward funds.)

FY 2003 Funding Considerations

We have not yet received any FY 2003 formula funding notices from the State Refugee Programs Branch. However, it is anticipated that funds will continue to decrease as refugee arrivals have. (In the first quarter of this fiscal year – October through December 2002 - San Francisco had only 11 refugee arrivals.)

Recommendations

The Executive Committee believes that the currently available activities and programs are sufficient and appropriate. We have a wide latitude to design and fund programs given the resources to do so.

It is recommended that at the August meeting of the Program Resources Committee, the program performance of the current refugee subcontractors be evaluated to determine future funding through cost reimbursement contracts. The criteria to be used for program evaluation was determined by the Research and Evaluation Committee at its meeting on May 2, 2002. The PRC recommends no changes to that criteria.

This recommendation means that the Executive Committee does not contemplate issuing a Request For Proposals (RFP). The Executive Committee feels confident that the current subcontractors have the necessary experience and competency it takes to provide quality services to refugees, asylees, and victims of trafficking.

Staff will be available at your April 11, 2003 meeting to answer any questions you may have. Please feel free to contact Karen Hart at 415-923-4260 should you have questions before the April 30th meeting.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PLANNING CONSIDERATIONS FOR YEAR EIGHT OF THE HOMELESS EMPLOYMENT COLLABORATIVE (HEC) (AGENDA ITEM 5K)

The Workforce Investment San Francisco (WISF) Board is asked to approve a development plan for Year Eight of the Homeless Employment Collaborative program.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

BACKGROUND

In April of 2002 the City and County of San Francisco submitted an application for a one-year renewal of funding of the Homeless Employment Collaborative (HEC) to the U.S. Department of Housing and Urban Development (HUD) for a total of $1,060,899. The one-year renewal period is from October 1, 2003 to September 30, 2004 for Year Eight of HEC funding. In July of the same year HUD notified the PIC that the HEC was selected for a one-year renewal, with the PIC as sponsor, under HUD's Supportive Housing Program.

RECOMMENDATION

The ten community-based organizations that have been HEC subcontractors for Years Six and Seven have been working together as a collaborative from 1996 to the present to develop a comprehensive and integrated employment and training system for the homeless population of San Francisco. Consequently, the city in consort with the PIC staff named the same subcontractors in the application to HUD for renewal of the program. Since no additional funds to the current funding level were awarded by HUD and since the HEC subcontractors have demonstrated over the last six and one-half years a very respectable track record, the Executive Committee does not recommend issuing an RFP for Year Eight. See the attached six-year program performance summary.

Staff will be present at your next meeting on April 30, 2003 at 9:30 a.m. to answer any questions.

Attachment

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA [illegible]
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800 735 2929 (CRS)

THE SAN FRANCISCO HOMELESS EMPLOYMENT COLLABORATIVE
SIX YEAR PROGRAM PERFORMANCE
PERIOD: OCTOBER 1, 1996 to SEPTEMBER 30, 2002

	Year One	**Year Two**	**Year Three**	**Year Four**	**Year Five**	**Year Six**
Time Period	10/1/96-9/30/97	10/1/97-9/30/98	10/1/98-9/30/99	10/1/99-9/30/00	10/1/00-9/30/01	10/1/01-9/30/02
Enrolled in Training	393	438	461	409	469	467
Job Placements	169	168	175	187	199	223
Job Placement Rate	43%	38%	38%	46%	42%	48%
Ninety Day Job Retention Rate	75%	71%	64%	79%	69%	62%
Average Wage at Placement	$7.92/hr	$8.53/hr	$8.72/hr	$9.70/hr	$10.66/hr	$11.25/hr
Average Hours per Week at Placement	31.91	32.29	33.67	34.27	34.58	33.31
Total Expenditures	$721,923	$833,044	$1,150,797	$971,639	$985,868	$1,047,247
Cost per Service	$1,837	$1,902	$2,496	$2,376	$2,102	$2,242
Cost per Job Placement	$4,272	$4,959	$6,576	$5,196	$4,954	$4,696

Summary of six year period:

Total enrolled in training	2,637	(100%)
Total job placements	1,121	(43%)
Total ninety day job retentions	781	(70%)

Total program expenditures	$5,710,518
Cost per service	$2,166
Cost per job placement	$5,094

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 5, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: WELFARE-TO-WORK (WtW) INDIVIDUAL REFERRAL (IR) PROGRAM RECOMMENDATIONS (AGENDA ITEM 6A)

The Workforce Investment San Francisco (WISF) Board is asked to approve Executive Committee's recommendation to discontinue two programs' cost reimbursement subcontracts and to place those two programs on the WtW Individual Referral (IR) vendor list.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

Information on under-performing cost reimbursement subcontractors (Chart #3)

Jewish Vocational Service (JVS) and San Francisco Sheriff's Department (SFSD) are being recommended for placement on the Individual Referral Vendor List for lack of program performance. Both cost reimbursement subcontractors were notified and agreed to this shift.

JVS operates a Career Advancement program for employed CalWORKs participants with a focus on providing skill enhancement, career counseling, job retention services, placement service, and job search skills to help assist participants attempting to transition off aid. JVS has only three of 12 planned enrollments.

SFSD operates a Job Readiness Training program for incarcerated Non-Custodial Parents (NCP) of children receiving aid. This is the second year of a pilot program targeting the NCP population. Although the SFSD has had limited success with recruiting clients as they leave the prison (jail) population, the SFSD has had no success with placing this client population in jobs. They have recorded no positive outcomes.

Based on this information the Executive Committee is recommending that these two agencies move to the IR Vendor List.

Staff will be available at the April 30, 2003 meeting to answer any questions. Please feel free to contact Michael Peters at (415) 431-8700 should you have questions before the April 30th meeting.

Attachments

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Chart #3A

Quarterly Statistics and Recommendations

Career Advancement and Job Retention

Subcontractor Name: Jewish Vocational Service
Program Name: At Work
Subcontract Number: 168A926P2
Activity: Post Employment Training
Start Date: July 1, 2002
Period of Time: 6 months of a 12 month contract

Career Advancement and Job Retention		***1st Quarter***	***2nd Quarter***	***3rd Quarter***	***4th Quarter***
Expenditure	*Plan*	$25,417	$50,833		
	Actual	$14,568	$14,568		
	% of Plan	57%	29%		
Enrollments	*Plan (WtW 123)*	4	12		
	Actual (MIS Roster)	1	3		
	% of Plan	25%	25%		
90 day retention	*Plan (WtW 123)*	0	3		
	Actual (MIS Roster)	0	0		
	% of Plan	N/A	0%		
180 day retention	*Plan (WtW 123)*	0	0		
	Actual (MIS Roster)	0	0		
	% of Plan	N/A	N/A		
270 day retention	*Plan (WtW 123)*	0	0		
	Actual (MIS Roster)		0		
	% of Plan	N/A	N/A		
Career Advancement (an increase in income including hourly wage, and benefits)	*Plan (WtW 123)*	0	2		
	Actual (MIS Roster)	0	0		
	% of Plan	0	0%		

*** Pending is defined as the number of documents submitted to PIC by the Subcontractor as of the report quarter that have not yet appeared on the MIS report.*

Contract Administrator's Comments:

Jewish Vocational Service's "At Work" program is not recommended for continued funding with a cost reimbursement subcontract, but will be placed on the Welfare-to-Work Vendor List.

This is a 12-month subcontract for $101,666; analysis is based on data from July 1, 2002 to December 31, 2002. Jewish Vocational Service was subcontracted to provide Career Advancement to twenty-seven (27) employed CalWORKs participants, but only enrolled three. This open entry/exit Career Advancement program focuses on providing skill enhancement, career counseling, job retention services, placement services, and job search skills to assist in the advancement of WtW clients attempting to transition off of aid through gainful employment.

JVS has attended 100% of the required bi-monthly WtW Advisory Committee meetings in the last 6 months and both cluster meetings.

As of 12/31/02, JVS is three months behind in the submission of invoices. The outstanding invoices include October, November and December 2002. JVS is being recommended for vendor list due solely to lack of enrollments.

4/23/2003

Chart #3B

Quarterly Statistics and Recommendations

Job Training, Job Placement and Retention

Subcontractor Name: San Francisco Sheriff's Dept.
Program Name: NCP Program

Subcontract Number: 344H801M1 #91
Activity: JRT/JP/JR

Start Date: July 1, 2002
Period of Time: 6 months of a 12 month contract

Job Training, Job Placement and Retention		***1st Quarter***	***2nd Quarter***	***3rd Quarter***	***4th Quarter***
Expenditure	*Plan*	$18,200	$36,400		
	Actual	$18,201	$24,268		
	% of Plan	100%	67%		
Enrollments	*Plan (WtW 123)*	9	18		
	Actual (MIS Roster)	1	11		
	% of Plan	11%	61%		
Completions	*Plan (WtW 123)*	2	9		
	Actual (MIS Roster)	0	0		
	% of Plan	0%	0%		
Placements	*Plan (WtW 123)*	1	6		
	Actual (MIS Roster)	0	0		
	% of Plan	0%	0%		
Wage Rate (average)	*Plan (stated in contract)*	$6.75	$6.75		
	Actual (MIS Report)	0	0		
	% of Plan	0%	0%		

*** Pending is defined as the number of documents submitted to PIC by the Subcontractor as of the report quarter that have not yet appeared on the MIS report.*

Contract Administrator's Comments:

The San Francisco Sheriff's Department (SFSD) is not recommended for continued funding with a cost reimbursement contract, but will be placed on the WtW vendor list.

This is a 12-month subcontract in the amount of $72,800; analysis is based on data from July 1, 2002 to December 31, 2002. SFSD operates a Job Readiness Training program for incarcerated Non-Custodial Parents (NCP) of children receiving aid. SFSD is contracted to enroll thirty (30) participants placing fifteen (15) into unsubsidized employment.

After clients are identified as eligible NCPs, SFSD provides them with an array of services focused on soft skills and parenting skills enhancement. The Sheriff's Department continues to experienced some difficulty with timely submission of paperwork, including invoices. At present, invoices are outstanding for November and December of 2002. Although SFSD did have some recent minimal success in recruiting clients, placement and retention for the last year and a half have been unsatisfactory.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (AGENDA ITEM 6B)

The Workforce Investment San Francisco (WISF) Board is asked to approve the additions to the youth provider vendor's list.

The Executive Committee met today, solicited public testimony, and reviewed and approved the recommendations.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco (WISF) Board, ratified the Youth Council's action and on December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002 the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001 without a due date.

DISCUSSION

RFQ is a process to identify and competitively select providers of specified services for individual referral at a quoted price. The use of an individual referral approach for securing youth services allows Youth Opportunity. San Francisco (YO! SF) staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process described above asked organizations to submit Statements of Qualifications. Each statement is reviewed and, if competitive and eligible to receive federal funds and provide the service(s) described, is recommended for placement on a vendors list.

Since June 27, 2002, additional potential vendors have submitted Statements of Qualifications.

RECOMMENDATION

Staff has reviewed all Statements of Qualifications submitted to the PIC, has determined the vendors to be eligible to receive WIA Title ID Funds and the Executive Committee recommends the vendors listed on Table I be added to the youth vendors list.

Attachment

PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
TITLE 1D YOUTH OPPORTUNITY GRANT (YOG)
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
163	**Inner-City Adolescent Network, Inc. Foundation** 3801 Third Street San Francisco, CA 94124 (415)806-3407	**ICAN** is a year-round program dedicated to youth guidance. ICAN will focus on "at risk" youth who have been incarcerated by or have had other contact with the juvenile justice system; youth who have been rejected by society and have difficulty with high truancy and youth who are from troubled or broken homes. ICAN will provide comprehensive guidance and counseling that promotes educational, social, vocational, cultural and character development. We seek to foster brotherly and sisterly relations, reduce the risk of ongoing criminal activity, and increase the awareness of individual academic and vocational abilities. ICAN will provide an array of youth development activities ranging from life skills training, community service/leadership development, academic tutoring support to job readiness training. The program schedule is from Monday - Friday from 3:30 pm to 8:45 pm, approximately 20 hrs/wk.	$3,500	YES
164	**Enterprise for High School Students** 450 Mission Street, Suite 408 San Francisco, CA 94103 (415)896-0909	**Career Compass**, a career and college counseling program, is designed to aid individuals in career choice through personal reflection, educational and occupational exploration, and decision making. The program will greatly benefit both persons who are having difficulties deciding on a future career path, and those who may want to confirm their occupation of choice. Participants meet with a counselor once a week for six weeks ranging from 12 - 20 hours with an additional bonus of 2 individual counseling sessions. The sessions are designed to take the individual through an extensive search of personal interests and exploration of career and educational choices.	$1,100 Individual rate or Group rate @ $500 per individual	YES
165	**Glide Foundation** 330 Ellis Street, #504 San Francisco, CA 94103 (415)674-6176	**Bay Area Construction Program (BACP)** will provide a 14-week hands-on pre-apprenticeship training program for eligible out-of-school youth 18-21 in the construction industry; fully endorsed by the unions, that covers such trades as: carpentry, cement masonry, electrical, ironwork, etc. The youth will earn 6 units of college credits upon successful completion of the program. Training is from 7am - 3:30 pm, Monday-Friday or evening classes from 6pm - 9pm. Certification courses in hazardous material handling, asbestos removal, lead abatement and confined spaces are included. Entry requirements are 18 yrs, have HS diploma or GED, have reliable housing, a minimum of 5th grade reading & math levels and clean & sober for at least 6 months. BACP will also provide after graduation basic tool set, sponsorship of union dues, ongoing case management, and job placement & retention services.	$5,150	YES
166		**Office Support Skills (OSS)** program will prepare eligible out-of-school youth 18-21 for entry level jobs in clerical and administrative fields earning $10-$15/hr. OSS will provide a 14 week computer based training in Microsoft Office Suite apllications (Word, Excel, PowerPoint, & Outlook Express), business correspondence format and style, use of business machines, Internet, etc. OSS will also provide job readiness training, case management, GED assistance, job placement and job retention services. Entry requirements are 18 yrs, have reliable housing and clean & sober for at least 6 months. After graduation, students will receive the 'Microsoft Office User Specialist's" (MOS) certification of computer skills which is recognized by employers as proof of proficiency in MS Office Suite.	$5,850	YES
167		**Tech Support** program will prepare eligible out-of-school youth 18-21 for entry level PC Technician & Technical Support jobs earning $12-20/hr. Youth will receive 20 wks of intensive classroom training to prepare them for such jobs as PC Repair Technician, Help Desk Specialist, System Administrator and more. Tech support will also provide job readiness, case management, GED assistance, job placement and job retention services. Entry requirements are 18 yrs, have reliable housing, a minimum of 9th grade reading & math levels and clean & sober for at least 6 months.After graduation, youth will receive 12 units of college credits and be eligible to take the A+ Certification Tests in hardware and software skills at no cost. This certification is recognized by employers as proof of proficiency in technical computer skills.	$6,150	YES

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 11, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: PROGRAM CONSIDERATIONS, WELFARE TO WORK, PROGRAM YEAR 2003-2004 (Agenda Item 6C)

The Workforce Investment San Francisco (WISF) Board is asked to consider advance third year recommendations for Welfare-to-Work (WtW) subcontracts for the Program Year beginning July 1, 2003 (PY'03).

The Executive Committee met today, solicited public testimony, and considered performance management action to shape the WtW program for PY'03. No dollar awards were discussed at this meeting, because total funding available is not yet known. Actual dollar recommendations will be discussed at the PRC meeting planned for May 6, 2003.

BACKGROUND

Current Welfare-to-Work contracts were solicited to begin July 1, 2001, with the stipulation that subcontractors could be funded for a maximum of 36 months depending on performance. For Program Year 2003, the Executive Committee approved the following guidance to evaluate programs:

- that eighteen months of contract activity be used to evaluate those programs active from July 1, 2001 through December 31, 2002; and
- that the results of the performance evaluation be used to determine whether to increase or reduce the amounts of the subcontracts and/or to extend or curtail their length through the third and final year of the three-year RFP solicitation period.

APPROVED EVALUATION CRITERIA

Each subcontractor was evaluated individually based on the subcontract entered into with the PIC using the following criteria:

JOB TRAINING/JOB PLACEMENT/JOB RETENTION COMPONENT:

1. The actual number of enrollments compared to the planned number of enrollments.
2. The actual number of completions compared to planned number of completions.
3. The actual number of placements compared to actual number of enrollments (60% minimum).
4. The actual placement rate compared to the planned placement rate. *
5. The proposed minimum wage for participants placed in jobs compared to the actual average wage achieved.
6. Actual compared to planned expenditures, timely submission of invoices, attendance forms, and other financial factors (i.e. audits, and other required paperwork, etc.).

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

**Subcontractors have a planned placement rate negotiated in their contract.*

CAREER ADVANCEMENT/JOB RETENTION COMPONENT:

1. 80% retained employment after 9 months.
2. 80% increase in income including hourly wage and health benefits.
3. 50% achieved skills enhancement objectives.

SUPPORTIVE SERVICE/RESILIENT FAMILIES COMPONENT:

1. 30% completed training or services as specified on their Employment Plan.
2. 15% placed in employment.
3. 10% retained employment for 270 days or more.

LEGAL SERVICES COMPONENT:

1. 65% positive resolution for those who obtain legal services.

MANAGING CHANGE

The Welfare to Work program in San Francisco is experiencing significant changes in its client base and funding:

- **CalWORKs**
  In April 1998, there were 8,500 households in San Francisco receiving CalWORKs grants. In January 2003 there were 4,976 households receiving grants. This represents a 41% caseload decline in less than five years. The continuous decline in our caseload leaves fewer people eligible to participate in Welfare-to-Work training programs.
- **PAES**
  Although the caseload has remained steady with a slight increase of 10% since last year, the single individuals who are being served in PAES continue to display multiple barriers to employment that require programs that include intensive vocational, behavioral health and treatment components.

INDIVIDUAL REFERRAL SUBCONTRACTS

At the Program Resource Committee meeting of March 4, 2003, members of the committee requested additional data as to Individual Referral career advancement outcomes. These data were included for review purposes but were not considered as part of the recommendation process.

CONSIDERATIONS:

The Executive Committee reviewed recommendations that were based on information gathered using the approved evaluation criteria for each subcontractor, the service needs defined by DHS, and participant demographics. Programs that were effectively meeting their performance objectives were approved to continue with either full or reduced funding. Programs that met less than 50% of their program objectives were recommended for the WtW vendor list in next year's budget.

Additionally, other changes may be made to accommodate the needs of clients such as:

1. Provide specialized services to participants with learning disabilities.
2. Target participants who are approaching their 60-month CalWORKs clock.
3. Have demonstrated a proven effectiveness in serving participants who are transitioning from behavioral health treatment into a supported work environment.
4. Provide service to limited English proficient participants who are working, but not earning enough to exit aid.
5. Provide service to people disconnected from the labor force due to present economic conditions.

Decisions were also based on the following two strategies:

1. Contracts that did not meet performance requirements were discontinued and agencies were moved to the Welfare-to-Work IR Vendor list.
2. Reduce third year funding level due to a decrease of available funding or change in client needs.

The Committee was provided with 77 pages of detailed comparison data and staff-produced performance summaries, supplemented by self-evaluation narratives from subcontractors. The attached table provides summary committee recommendations.

Please feel free to contact Michael Peters, Senior Contract Administrator, Welfare-to-Work, at (415) 431-8700 ext. 343 should you have any questions before your meeting.

Recommendations for Welfare-to-Work
Cost Reimbursement Subcontracts
Fiscal Year 2003

Job Training Programs

Subcontractor		Current Contract Amount	Recommendation	Comments
#65	Arriba Juntos (MUNI)	$147,014	Continue Contract	Funding to be determined
#59	California Lawyers for the Arts	**$115,792**	Move to Vendor	Funding to be determined
#64	Haight-Ashbury Food Program	$113,446	Continue Contract	Funding to be determined
#20	Jewish Vocational Service	**$293,958**	Continue Contract	Funding to be determined
#55	No. California Service League	$12,000	Continue Contract	Funding to be determined
#84	The Family School/YCD	$198,000	Continue Contract	Funding to be determined

Career Advancement/Job Retention

Subcontractor		Current Contract Amount	Recommendation	Comments
#107	Catholic Charities	**$259,700**	Move to Vendor	Funding to be determined

VESL Supportive Services

Subcontractor		Current Contract Amount	Recommendation	Comments
#68	Arriba Juntos	**$239,549**	Continue Contract	Funding to be determined
#114	Catholic Charities	**$138,327**	Continue Contract	Funding to be determined

Legal Assistance

Subcontractor		Current Contract Amount	Recommendation	Comments
#69	Bay Area Legal Aid	**$165,170**	Continue Contract	Funding to be determined

***Bold** numbers indicate two year amounts; recommendations are based on one year subcontracts.*

April 1, 2003

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, June 18, 2003
Time: 9:30 a.m. – 11:30 a.m.
Location: SBC Conference Center
370 Third Street
San Francisco, CA 94107

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

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Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

♿ If you require special accommodation due to a disability, please call Roberta Fazande at 415-923-4265 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

Issued: Wednesday, June 11, 2003

AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, JUNE 18, 2003

Item	Presenter	Time
1. Adoption of the Agenda *(Action Item)*	Lynn Bunim	1 min.
2. Approval of draft minutes from the April 30, 2003 meeting *(Action Item)***	L. Bunim	3 min.
3. Public Testimony on Agenda Items (Discussion Item)	L. Bunim	TBA
4. Presentations A. "Union and Apprenticeship Training"* B. "City College Provided Training" * C. "San Francisco's Workforce Development System"* D. Success Stories in San Francisco LIVE!	 Kevin Stange, WISF Board Research Analyst Prgm. Participants	45 min.
5. Committee Reports (Information Item) A. Employer Services Committee B. One Stop Operations and Services Committee C. Program Resources Committee D. Youth Council	Committee Chairs	20 min.
6. Consent Calendar *(Action Item)** All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum). A. Proposed Action: Ratification of Acceptance of Community Development Block Grant to operate Tax Credit Vouchering Project *(Action Item)**		
7. Executive Committee Recommendations *(Action Item)** A. Proposed Action: Ratification of Workforce Investment Act, Title IB Adult Recommendations B. Proposed Action: Ratification of Workforce Investment Act, Title IB Youth Recommendations C. Proposed Action: Ratification of Workforce Investment Act, Title ID Youth Recommendations	Pamela Calloway	20 min.
8. President's Report (Discussion Item)	P. Calloway	15 min.
9. Chair's Report (Discussion Item)	L. Bunim	10 min.
10. Public Testimony on Non-Agenda Items (Discussion Item)	L. Bunim	TBA
11. Future Agenda Items (Discussion Item)	L. Bunim	10 min.
12. Adjournment *(Action Item)*	L. Bunim	1 min.

*Information enclosed.

**Information will be emailed to Board Members and posted on website at www.picsf.org.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT S.F. BOARD **DATE:** JUNE 11, 2003

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: MAPPING SAN FRANCISCO'S WORKFORCE DEVELOPMENT SYSTEM (Agenda Item 4A – C)

It is my pleasure to bring to you two pieces of research that we will be discussing at our upcoming meeting. The first, *Overview of City College of San Francisco* synthesizes a wealth of information to provide you with a very accessible picture of what services City College provides and its important role in our workforce development system. The second, *Union-Affiliated Training in San Francisco*, provides a similar overview of the training provided by our local labor organizations and union-affiliated training programs.

These two reports constitute the final building blocks of our yearlong "resource mapping" project, which has also explored training provided by San Francisco's community-based organizations and employers.[1] We sought out on this effort to answer the simple question: "Who does what?" with respect to workforce development in San Francisco. Armed with the answers to this question, we as a Board can now move forward even stronger, equipped with a much better knowledge of where our valuable workforce development resources lie.

What we have learned

To put it simply, we've learned that San Francisco is a community deeply invested in the education of its residents and that its system for enhancing the skills of its workforce is no exception. Many organizations and institutions play a key role in this process:

- Community-based organizations help workers acclimate to the workplace through short-term job readiness and occupational training in conjunction with intensive support;
- City College provides extensive short- and long-term vocational and language training and a bridge to more advanced education;
- Labor organizations provide long-term vocational training closely tied to employer needs; and
- Many workers experience lifelong learning through formal and informal workplace training provided by their employers.

In fact, few San Franciscans are not served by the City's expansive workforce development system each year. This system is supported financially by many institutions, including philanthropic organizations, San Francisco City departments, employers, the PIC, and State and Federal government agencies.

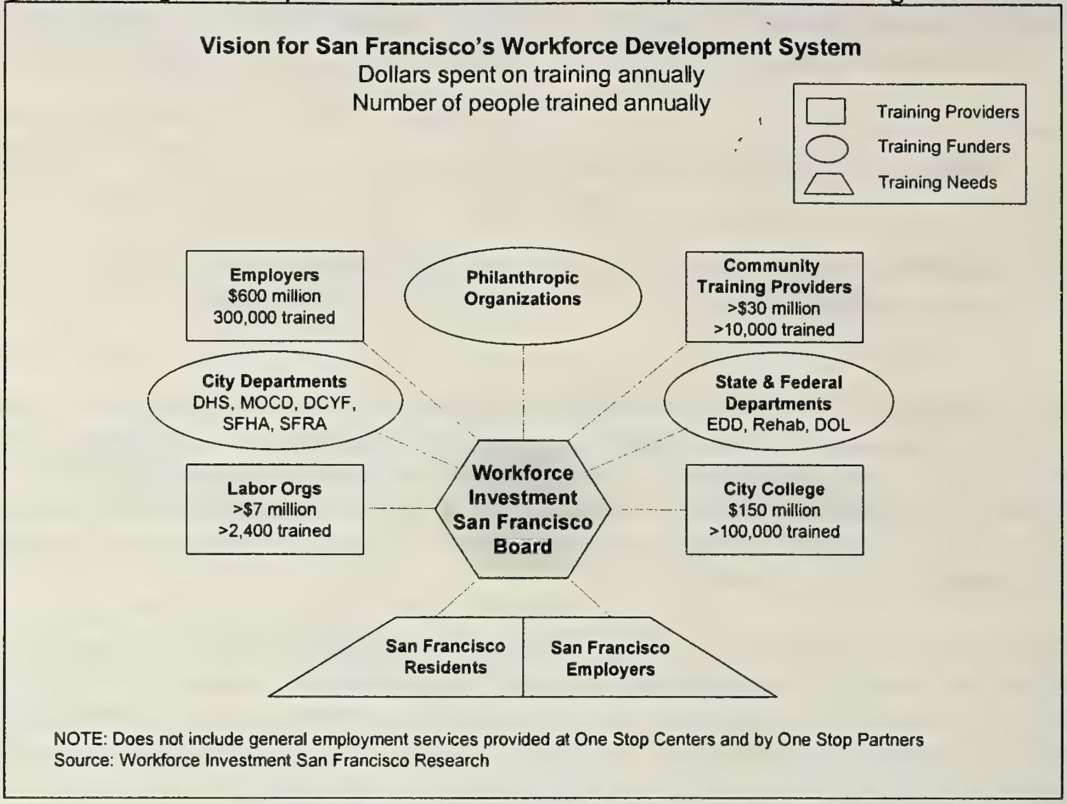
Workforce Investment San Francisco Board's role

The Workforce Investment San Francisco Board should sit at the intersection of this system. Our Board was established to connect San Francisco's employers, residents, training providers, and the financial, informational, and intellectual resources that support them. The diagram that follows illustrates my vision for this system.

---

[1] See WISF reports *Building Tomorrow's Workforce: Community-based Adult Employment and Training Programs in San Francisco* and *Research Brief: Employer-Provided Training.* Both are available at www.picsf.org/research.

Assuming this vantage would present our Board with a unique set of challenges.



Vision for San Francisco's Workforce Development System
Dollars spent on training annually
Number of people trained annually

Training Providers
Training Funders
Training Needs
Employers
$600 million
300,000 trained
Philanthropic Organizations
Community Training Providers
>$30 million
>10,000 trained
City Departments
DHS, MOCD, DCYF, SFHA, SFRA
State & Federal Departments
EDD, Rehab, DOL
Labor Orgs
>$7 million
>2,400 trained
Workforce Investment San Francisco Board
City College
$150 million
>100,000 trained
San Francisco Residents
San Francisco Employers

NOTE: Does not include general employment services provided at One Stop Centers and by One Stop Partners
Source: Workforce Investment San Francisco Research

In this role, we must coordinate our resources to identify and address system-wide gaps and redundancies in our expansive service network. We must deploy these resources in the most effective and efficient manner by continuously assessing outcomes and evaluating success. We must regularly gauge and collectively respond to the training needs of the City's residents and employers, so that no worker is left ill prepared, and no job goes unfilled.

Doing so will not be easy, but the benefit to San Francisco's residents, employers, and economy could be great.

We will begin our discussion of how we can achieve this vision at our next meeting on June 18th, following the presentation of the attached research. I would like us to leave this discussion with a shared understanding of our system's workforce development resources, and with the formation of a task force charged with overseeing the development a Workforce Development Strategic Plan, to be refined at our Board retreat on July 31st and August 1st.

You'll find both of the attached reports to be fairly short, but informative, so please do have a look at them prior to our meeting, so that we may begin our conversation with the greatest common understanding of the resources we draw on and the challenges we face.

I look forward to our thoughtful exchange of ideas next week.

Attachments

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

Research Brief:

Union-Affiliated Training in San Francisco

June 2003

Executive Summary

This Research Brief provides an overview of the training provided by San Francisco's labor unions and union-affiliated training programs in order to highlight the key role that labor organizations play in San Francisco's workforce development system.

Summary of findings

Through their role as training providers, San Francisco's labor unions are a significant component of the City's workforce development system. At least one-in-four labor organizations complement their collective bargaining and advocacy efforts with training programs that directly enhance the skills of their members.

INSIDE Page
How much? 2
What type? 3
Access 4
Employer needs & continuing education 5
Summary & recommendations 5
Bay Area apprenticeship programs 7

- More than 2,400 individuals are reached and more than $7 million is invested each year in the skills of San Francisco's workers through union-affiliated training programs, most of which take the form of state-approved apprenticeship programs.
- Union-affiliated training spans the range of occupations – from hotel workers to plumbers – but is concentrated in the construction trades.
- Union-affiliated training offers many advantages: 1) Jobs are well-paid and most trainees are paid while they learn; 2) Training is long-term, closely aligned with the needs of employers, and often connected with subsequent educational opportunities; 3) Programs include an array of occupational, safety, and communication skills and usually provide a strong peer support network; and 4) Related work experience is seldom required.
- Entry into union-affiliated training can be competitive, particularly during an economic downturn when jobs – and hence training opportunities – are scarce. Applicants must also usually possess basic math, reading, and language skills before entering training, and few programs directly help trainees mitigate severe skill deficiencies in these areas.

Recommendations to San Francisco's Workforce Development Community

To ensure that more San Franciscans have the opportunity to take advantage of the invaluable, work-based training that many labor organizations offer, San Francisco's workforce development community should:

1. Be more aware of the broad range of union-affiliated training and apprenticeship programs that San Francisco's residents can access.
2. Help other local training providers (e.g. community organizations, City College, SF Unified School District) ensure that graduates of their programs are adequately prepared to enter union-affiliated training and encourage labor organizations to continue and expand their outreach efforts with these providers.
3. Encourage San Francisco's employers to expand their collaborative training efforts with labor organizations by expanding the number of entry-level training opportunities available during economic downturns and supporting the continuing education of more advanced workers.

This *Research Brief* is the fourth in a series of reports profiling each of the major components of San Francisco's workforce development system, to inform workforce policy-makers and practitioners. Previous reports have examined the role of community-based organizations, employers, and City College of San Francisco and are available at *www.picsf.org/research*. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

This report was prepared by Kevin Stange, Research Analyst for Workforce Investment San Francisco, who can be reached at (415) 557-6569 or *kevin_stange@ci.sf.ca.us*. The author would like to especially thank the Bay Area Apprenticeship Coordinators Association (BAACA) and the San Francisco Labor Council, Dan Whooley and Tom Ryan in particular, without whose support this research would not have been possible.

Introduction

This Research Brief provides an overview of the training provided by San Francisco's labor unions and union-affiliated training programs. Many labor organizations complement their collective bargaining and advocacy efforts with training programs that directly enhance the skills of their members. This Brief was developed in order to highlight the key role that labor organizations play in San Francisco's workforce development system. This report is fourth in a series of reports published by Workforce Investment San Francisco (WISF) that profile major elements of that system, including training provided by community-based organizations, employers, community colleges, and labor organizations.

All of the information presented herein was gathered through an original survey of San Francisco's labor organizations and union-affiliated apprenticeship programs in the Bay Area.

Findings about union-affiliated training

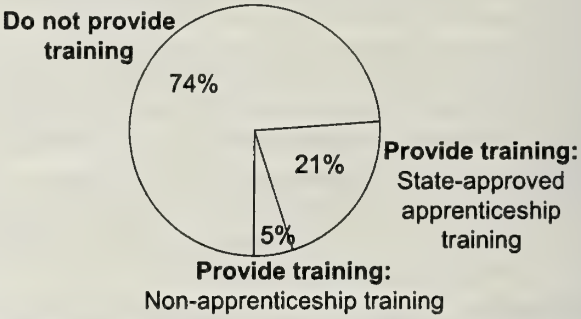
How much training do San Francisco's labor organizations provide?

Of the more than 130 labor organizations representing San Francisco workers, at least one in four provide training to their members.[1] Most of these union-affiliated training programs are formal state-approved apprenticeship programs. Apprenticeship combines formalized on-the-job learning with supplemental classroom instruction, often over the span of several years. Apprentices learn their occupation while working, reaching "Journey-level" status and pay at the successful completion of their program. In addition, many other labor organizations provide their entry-level members with instruction that is not part of a formal apprenticeship curriculum, but is a significant means of upgrading workers' skills nonetheless.

Our detailed survey of these union-affiliated training programs reveals the depth of training that local labor unions offer their members.

Do San Francisco's Labor Organizations Provide Training?

133 Labor Organizations in SF



Note: Umbrella organizations, councils, and alliances of local unions are excluded.

How much training is provided by San Francisco's labor organizations and their affiliates?

- More than 2,400 San Franciscans trained annually
- Approximately $3,000 invested per worker every year
- Up to $12,000 invested per worker over 4 years
- At least $7.2 million total invested annually

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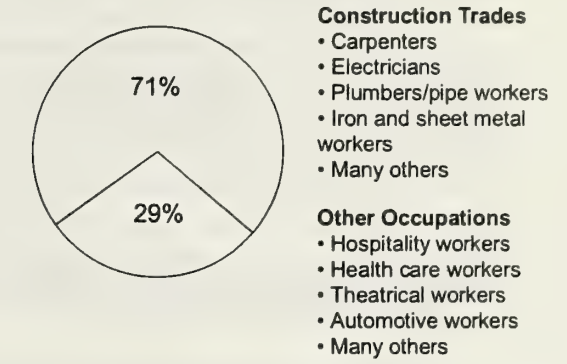
[1] A comprehensive list of labor organizations representing San Francisco's workers was developed, which includes organizations affiliated with the San Francisco Labor Council and the San Francisco Building and Construction Trades Council, and those listed in the Bay Area Progressive Directory. Of these, 35 organizations were identified as providing training to their entry-level members from phone/mail surveys, Internet research, and personal knowledge of SF Labor Council staff. These 35 organizations were then surveyed to obtain detailed information about the 46 distinct training programs they operate.

The programs collectively train more than 2,400 San Francisco residents in entry-level jobs every year, and a countless number of more experienced workers through advanced and skills-upgrade training.

On average, each of these programs spends about $3,000 per apprentice or trainee per year – that is more than $7.2 million invested in the skills of San Francisco's entry-level workforce every year by union-affiliated programs. Since programs average almost four years in duration, some labor organizations invest up to $12,000 in the skills of their individual members.

Funding for state-approved apprenticeship programs comes primarily from employers' and union members' contributions to an apprenticeship training fund, administered by a joint labor-management committee. Non-apprenticeship programs are funded in a similar manner, through joint contributions by employers and workers. Both types of programs are often supplemented by the financial support of Federal, State, and Local government.

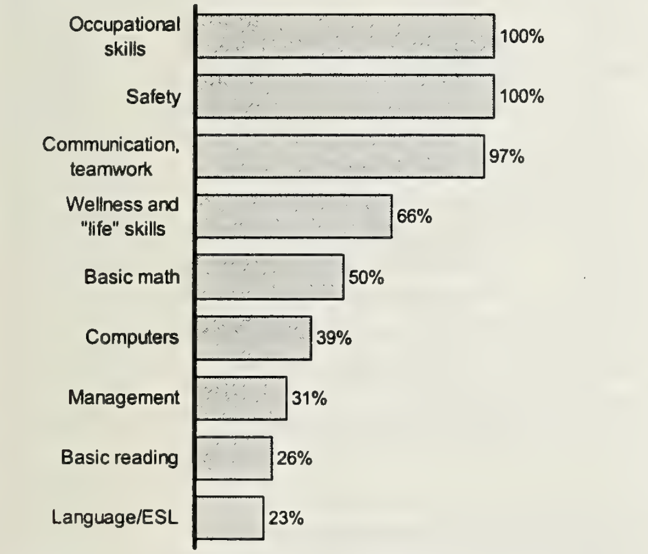

Occupations Trained by SF Labor Organizations

Source: WISF analysis of 133 SF labor organizations

What type of training do unions provide?

Union-affiliated training tends to focus on the occupational skills and competencies needed to perform the specific jobs being trained for, and less on remedial and other more general skills.

Occupational training is at the heart of all union-affiliated training programs. All of the construction trade unions offer training to new members, as do the local labor unions for meat-cutters, automotive mechanics, hotel and restaurant workers, and health care workers, among many others. The US Department of Labor identifies more than 850 different occupations that are apprenticeable.


What type of training do labor organizations provide?
Fraction of training programs offering type of training

Source: WISF survey of union-affiliated training programs

Safety, communication, and teamwork skills are also integrated into nearly all union-affiliated programs.

While most programs refer applicants with reading, math, or English language deficiencies to local community colleges or adult schools, some do offer remedial content within their curriculum. Nearly half offer basic math coursework or assistance and a quarter offer language and reading assistance, though survey respondents indicated that these services are generally not sufficient to address severe basic skill deficiencies. Advanced training in computer and management/supervisory skills is also relatively rare.

To help their members succeed, many labor organizations provide access to supportive case management services during and beyond training. More than 60% of programs acknowledge providing such services, either formally or informally. In addition, union membership provides new workers with a strong support network of mentors, peers, and life-long colleagues.

Who can access union-affiliated training?

Union-affiliated training does not generally require advanced education or any experience - 64% require a high school certificate or GED and few require any previous work experience. However, successful candidates usually must possess basic math skills, English proficiency and the ability and attitude for sometimes physically-demanding work. 41% of programs have a written examination that largely tests mathematical aptitude and 30% have an oral interview that assesses personal motivation and attitude.

What is needed to get into union-affiliated training?
Fraction of training program with entry requirement

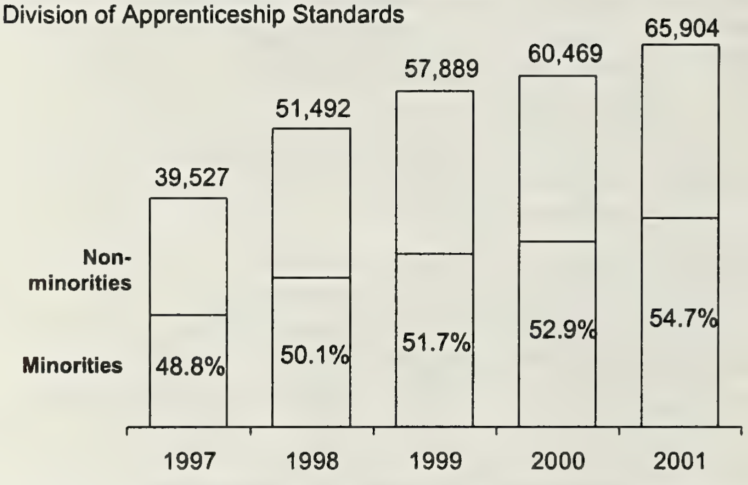
✓ Be at least 18 years old	80%
✓ Possess High School diploma or GED	64%
✓ Possess California Driver's License	52%
✓ Pass written examination	41%
✓ Find employer to sponsor training	33%
✓ Pass oral interview	30%
✓ Related work experience	Few
✓ Computer ability	None

Source: WISF survey of union-affiliated training programs

Union-affiliated training can sometimes be difficult to access geographically. Since many training and work sites may be located throughout the region and workers often operate machinery or vehicles on the job, 52% of programs require a CA Driver's License at the commencement of their training.

Entry into union-affiliated training can also be competitive, particularly during an economic downturn. One-third of surveyed programs require applicants to find an employer to sponsor their training before they can enroll in the program. Even among programs that provide job placement upon acceptance into training, entry is often restricted when jobs – and hence training opportunities – are scarce.

Total Number of Apprentices in California
Division of Apprenticeship Standards



Source: California Department of Industrial Relations, Division of Apprenticeship Standards: *2001 Annual Legislative Report*

Nationally, there has been a concerted effort by many labor organizations to extend training and employment opportunities to workers who previously might not have accessed them, such as low-income, minority, and female workers.[2] California and San Francisco labor organizations are no exception. As a result of these efforts, the share of minority apprentices in California has steadily increased by 6% since 1997, according to the Division of Apprenticeship Standards of the California Department of Industrial Relations. This expansion of access has been achieved in part through collaborative efforts between union training programs and other community based organizations (CBOs). Locally, 30% of surveyed programs cited relationships with pre-apprenticeship programs operated by San Francisco organizations such as Asian Neighborhood Design, Chinese for Affirmative Action, Ella Hill Hutch, Job Corps, Mission Hiring Hall, and Young Community Developers as one source of recruiting new applicants.

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[2] For an overview of many of these outreach efforts, see Turner, Brian J. (2001) "Union Innovations: Moving Workers from Poverty into Family-Sustaining Jobs." In *Low-Wage Workers in the New Economy.* Washington DC: The Urban Institute Press, 2001.

Does union-affiliated training support employer needs and further education?

Since apprenticeship training is predominately on-the-job and almost always overseen by a committee composed jointly of employer and labor representatives, curriculum is well suited to the specific training needs of employers. The California Division of Apprenticeship Standards, the State oversight body, develops and enforces skill and curriculum standards for all apprenticeship programs in the State.

Union-affiliated training may also offer a bridge to subsequent education. Approximately 40% of surveyed programs' coursework is for college credit, primarily at local community colleges, and most labor organizations offer advanced and continuing education classes for their more experienced members.

Summary and Recommendations

Summary of findings

Through their role as training providers, San Francisco's labor unions are a significant component of the City's workforce development system. At least one in four labor organizations complement their collective bargaining and advocacy efforts with training programs that directly enhance the skills of their members.

- More than 2,400 individuals are reached and more than $7 million is invested each year in the skills of San Francisco's workers through union-affiliated training programs, most of which take the form of state-approved apprenticeship programs.
- Union-affiliated training spans the range of occupations – from hotel workers to plumbers – but is heavily concentrated in the construction trades.
- Union-affiliated training offers many advantages:
    - Jobs are well-paid and most trainees are paid while they learn.
    - Training is long-term, closely aligned with the needs of employers, and often connected with subsequent educational opportunities.
    - Programs include an array of occupational, safety, and communication skills and usually provide a strong peer support network.
    - Related work experience is seldom required.
- Entry into union-affiliated training can be competitive, particularly during an economic downturn.
    - Some trainees must find a sponsor employer before beginning training and many programs restrict entry when jobs – and hence training opportunities – are scarce. Coupled with the moderate number of new

training openings (roughly 600 per year under normal conditions), an economic downturn can make training very competitive.

  - Applicants must also usually possess basic math, reading, and language skills before entering training. Few programs directly help trainees mitigate severe skill deficiencies in these areas and most have specific application steps (HS diploma/GED, written test, oral interview) to assess these skills. To meet these demands, about 30% of programs recruit from local community based organizations (CBOs) that prepare workers to succeed in these areas.

Recommendations

To ensure that more San Franciscans have the opportunity to take advantage of the invaluable, work-based training that many labor organizations offer, San Francisco's workforce development community should:

- Be more aware of the broad range of union- affiliated training and apprenticeship programs that San Francisco's residents can access. A quick reference guide to these programs, endorsed by the Bay Area Apprenticeship Coordinators Association (BAACA), can be found in the back of this report.
- Help other local training providers (e.g. community organizations, City College, SF Unified School District) ensure that graduates of their programs are adequately prepared to enter union-affiliated training and encourage labor organizations to continue and expand their outreach efforts to these providers.
- Encourage San Francisco's employers to expand their collaborative training efforts with labor organizations by expanding the number of entry-level training opportunities available during economic downturns and supporting the continuing education of more advanced workers.

Bay Area Apprenticeship Programs at a Glance

Consult on-line directory at www.calapprenticeship.org

APPRENTICE OCCUPATION		CONTACT INFORMATION	PROGRAM REQUIREMENTS				APPLICATION PROCESS			PROGRAM DESCRIPTION				
	by Area		Min Age	CA DL required	HS/GED required	High School Classes	App frequency	Written exam	Oral exam	Duration (years)	OJT hours	Class hours	Placement	College credit
AC/Refrigeration Mechanic	East Bay*	Bill Blalock 925-686-0730	18	Yes	Yes	A-B-G-T-D	Open	Yes	Yes	5	9000	1080	Licensed to seek	
	San Mateo	Rick Garban 650-692-0442 or rgarban@aol.com	18	Yes	Yes	B*-G-S	1/year	Yes	Yes	5	8000	1340	Licensed to seek	Yes
	San Francisco*	Steve Mazzola 415-626-2000	18	No	Yes	A-B-G-T-D	2 years'	Yes	Yes	5	9000	1080	Ranked list	
	South Bay	Carl Cimino 408-453-6330 or carl@pttc393.org	18	Yes	Yes	A	Open	Yes	Yes	5	9000	1065	Licensed to seek	Yes
Automotive Trades	Bay Area	Karl Cortese Oak: 510-569-8450 SJ: 408-291-2540 Fres: 559-264-2815 or autojac2@aol.com	18	Yes	Yes	I-Au-Wel	Open	Yes	No	4	8000	576	Licensed to seek	Yes
Boilermaker	Nor. CA	Otis Edwards 925-427-4141	18	No	Yes	B*	Monthly	No	No	4	6000	576	Ranked list	No
Bricklayer	Nor. CA	Michael Height 510-553-0991	18	Yes	Yes	B-I-M-Bus	Open	No	No	4	6000	504	Licensed to seek	No
Butcher	West/North Bay	John Ulrich 650-871-3520	18	Yes	No		TBA	No	No	2	4000	288	Licensed to seek	No
Carpenter	Nor. CA	Neil Whitbeck 925-462-9644 or nwhitbeck@ctcnc.org	18	No	Yes	B	Open	No	No	4	4800	612	Ranked list	No
Cement Mason	Nor. CA	Mark Gonzalez 925-484-2271	18	No	No		Open	No	No	3	4200	432	Ranked list and Licensed to seek	No
Culinary	San Francisco*	Joanne Ortega 415-989-8726	16	No	Yes	B	1/year	No	Yes	3	6000	432	Ranked list	
Drywall Lather	Nor. CA	Dan Burchfield 510-785-5885 or 2foot@drywall-lathing.com	17.5	No	Yes	B-G	Open	No	No	4	4800	576	Union dispatched	Yes
Electrician (Inside Wireman)	Alameda*	Byron Benton 510-351-5282	18	Yes	Yes	A*-B*	4/year	Yes	Yes	5	8000	800	Ranked list	
	Contra Costa	Greg Arcidiacono 925-228-2302	18	Yes	Yes	A*-B*	1/year	Yes	Yes	5	8000	900	Ranked list	Yes
	San Mateo	Kathleen Barber 650-591-5217 or ibewneca617@sbcglobal.net	18	Yes	Yes	A*-B*-T-G	Monthly	Yes	Yes	5	8000	800	Ranked list	Yes
	San Francisco	Dan Whooley 415-431-5853 or dan@sfjatc.com	17	Yes	Yes	A*-B*-T-D	2/year	Yes	Yes	5	8000	800	Ranked list	Yes
Fire Fighter, Paramedic	Nor. CA	Taral Schlup 916-648-1717 or cffjac@cpf.org	18	No	Yes	A-G-Ch-Bio-S	Open	Yes	Yes	3	varies	432	Varies by Dept	Yes
Floor Covering	Nor. CA	Jack Oyhancabal 510-259-1102 or floorcoveringjatc@sbcglobal.net	18	No	No	B-M	Monthly	Yes	No	4	6000	576	Licensed to seek	No
Glazier	Nor. CA	Jim Graham 510-782-4232	17	Yes	Yes	B*	Open	Yes	No	5	7500	432	Union dispatched	No
Hardwood Floor Layer	Nor. CA*	Alejo Ricardez 408-778-1552	17	No	No		Open	No	No	3	3600	444	Ranked list	
Heat/Frost Insulator	Nor. CA	Dave Feere 510-769-4200	18	Yes	Yes	A*-G*	Monthly	Yes	No	4	6000	576	Union dispatched	No
Heavy Duty Coach Mechanic	Bay Area	Timothy Dawkins 510-891-2552 or Tdaukins@actransit.org	18	Yes	Yes		1/year	Yes	Yes	4	8000	864	Licensed to seek	No
Ironworker (Field)	East/North Bay	Dick Zampa 707-746-7666	18	No	Yes		Open	No	No	3	6000	600	Licensed to seek	
	West/South Bay	Dana Fairchild 408-988-5511	18	No	Yes		Open	No	No	3	6000	675	Ranked list and Licensed to seek	No
Ironworker (Shop)	Nor. CA	Jim Hood 510-639-7338	18	No	No	B	Open	Yes	No	4	8000	520	Licensed to seek	No
Laborer	Bay Area	Jeff Armstrong 925-556-0858 or apprenticeship@norcalaborers.org	18	No	No	B	Open	No	Yes	1.5	3000	240	Ranked list	No
Irrigation Fitter, Undgrd Piping	Nor. CA	Dennis Soares 707-644-0355 or ualocal355@aol.com	18	No	No	B-I	Open	No	Yes	5	9000	576	Union dispatched	Yes
Lithographer	Nor. CA	Lennie Cuhls 415-239-7700	18	No	Yes		TBA	No	No	4	7250	306	Licensed to seek	No
Marble Finisher	Nor. CA	Michael Height 510-553-0991	18	Yes	Yes	B-I-M-Bus	Open	No	No	2	3500	324	Licensed to seek	No
Marble Mason	Nor. CA	Michael Height 510-553-0991	18	Yes	Yes	B-I-M-Bus	Open	No	No	3	4500	215	Licensed to seek	No
Mill Cabinet Maker	Bay Area	Ruben Lopez 510-446-2236	17	No	Yes	A-B-D-M-Wd-CAD	Open	No	No	4	4800	576	Ranked list and Licensed to seek	Yes

Bay Area Apprenticeship Coordinators Association
Workforce Investment San Francisco
June 2003

Bay Area Apprenticeship Programs at a Glance

Consult on-line directory at www.calapprenticeship.org

APPRENTICE OCCUPATION		CONTACT INFORMATION	PROGRAM REQUIREMENTS				APPLICATION PROCESS			PROGRAM DESCRIPTION				
	by Area		Min Age	CA DL required	HS/GED required	High School Classes	App frequency	Written exam	Oral exam	Duration (years)	OJT hours	Class hours	Placement	College credit
Millwright and Machine Erector	Nor. CA	Terry Callan 925-462-9644	17	No	Yes	A*-B*-I	1/year	No	No	4	4800	576	Ranked list	No
Operating Engineer	Nor. CA	Curtis Brooks 916-354-2029 or cbrooks@oe3.org	18	Yes	No	B-I	Open	No	Yes	4 or 5	6400 or 8500	320 or 400	Union dispatched	No
Painter	East/North Bay	Paul Nahm 510-724-3200	18	No	Yes	B	Open	Yes	No	4	4800	480	Licensed to seek	
	West/North Bay	Peter Germenis 650-301-1600 or pttpsfca@pacbell.net	18	No	Yes		Open	No	No	3	4020	480	Licensed to seek	Yes
Pile Driver	Nor. CA	Terry Callan 925-462-9644	17	No	No	B-I	1/year	No	No	4	4800	612	Ranked list	No
Plasterer	Bay Area	Robert Noto 650-827-1451 or b.noto@worldnet.att.net	18	Yes	Yes	A-B*-G-I	Open	No	No	4	6400	576	Union dispatched	No
Plumber, Pipe/Steam Fitter	Alameda*	Bill Blalock 925-686-0730	18	Yes	Yes	B	TBA	Yes	Yes	5	9000	1080	Ranked list	
	Contra Costa	Vince Radosevich 925-229-0883	18	Yes	Yes	B-D	1/year	Yes	Yes	5	9000	1200	Ranked list	Yes
	San Francisco*	Steve Mazzola 415-626-2000	18	No	Yes	B-D-I-M	TBA	Yes	Yes	5	9000	1080	Ranked list	
	San Mateo	Rick Garban 650-692-0442 or rgarban@aol.com	18	Yes	Yes	B*-G-S	1/year	Yes	Yes	5	8000	1340	Licensed to seek	Yes
	South Bay	Carl Cimino 408-453-6330 or carl@pttc393.org	18	Yes	Yes	A	1/year	Yes	Yes	5	9000	1065	Ranked list	Yes
Plumber (Residential)	South Bay	Carl Cimino 408-453-6330 or carl@pttc393.org	18	Yes	Yes	A	Open	Yes	Yes	4	7200	852	Licensed to seek	Yes
Pointer, Cleaner, Caulker	Nor. CA	Michael Height 510-553-0991	18	Yes	Yes	B-I-M-Bus	Open	No	No	3	4500	324	Licensed to seek	No
Roofer & Waterproofer	Bay Area	M. Duane Mongerson 510-628-3650 or rwprogram@aol.com	18	No	No	A-B*D-I-M	Open	No	No	3.5	4000	378	Ranked list	Yes
Sheet Metal Worker	East Bay	Mike Longeuay 510-483-9035 or mikel@smw104.org	16	Yes	Yes	B	Monthly	Yes	No	5	9000	900	Ranked list	
	SF/North Bay	Frank Cuneo 415-431-1676 or frankc@smw104.org	16	Yes	Yes	B	2/month	Yes	No	5	9000	900	Ranked list	Yes
	San Jose	Pat Pico 408-293-1144 or patp@smw104.org	16	Yes	Yes	B	Monthly	Yes	No	5	9000	900	Ranked list	
	San Mateo	Kevin Lindsey 650-652-9672 or kevinl@smw104.org	16	Yes	Yes	B	Monthly	Yes	No	5	9000	900	Ranked list	
Sound & Comm. Technician	Nor. CA	Vince Cosentino 408-453-3101 or norcalrtd@aol.com	18	No	Yes	A-B	Monthly	Yes	Yes	3	6000	450	Ranked list	No
	San Francisco	David Lera 415-431-5853 or dlera@sfjatc.com	18	Yes	Yes	A-B	Monthly	Yes	Yes	3	6000	504	Ranked list	Yes
Sprinkler Fitter	Bay Area	Linda Loeffler 510-782-9483 or linda@sprinklerfitters483.org	18	Yes	Yes	B	2/month	Yes	Yes	5	8000	1040	Ranked list	Yes
Stationary Engineer	Nor. CA	Jim Maple 415-285-3939 or jmaple@local39training.org	18	No	Yes	A-B	2 years	Yes	No	4	8000	864	Ranked list	No
Surveyor	Nor. CA	Floyd Harley 510-748-7413 or ncsjac@aol.com	18	Yes	No	A-B-T	Open	Yes	No	4	8320	624	Ranked list	No
Taper	Bay Area	Paul Nahm 510-724-3200	18	No	Yes	B	Open	Yes	No	3	3600	480	Licensed to seek	
Tile Finisher	Nor. CA	Mark Sylvester 510-553-0991 or sylvester@bac3train.com	18	Yes	No	B	Open	No	No	2	3500	252	Licensed to seek	No
Tile Layer	Nor. CA	Mark Sylvester 510-553-0991 or sylvester@bac3train.com	18	Yes	No	B	Open	No	No	3	4500	378	Licensed to seek	No

Table prepared for BAACA by Kevin Stange, Research Analyst for Workforce Investment San Francisco (ph:415-557-6569; kevin_stange@ci.sf.ca.us) Please direct all corrections to BAACA.

** Indicates that program sponsor could not be reached to update guide. Information was obtained from previous BAACA guide, compiled in 1998.*

EXPLANATION OF TABLE AND CODES

Occupation: Many programs may also include several different specialized occupations not listed.

Program Requirements are provided for informational purposes only. Applicants should consult program sponsor for complete and current description of entry requirements.

Minimum Age: Applicants younger than 18 must have signed parental permission to apply. **CA Driver's License:** Some programs marked as requiring CA Drivers License may require it at time of indenture, not application.

Physical Ability to perform job tasks: 1 = Average; 2 = Above Average (40 lb); 3 = Well Above Average (80lb)

High School Classes: A = Algebra, Au = Auto, B = Basic Math, Bio = Biology, Bus = Business, CAD = Computer-aided Design, Ch = Chemistry, D = Drafting, G = Geometry, I = Industrial Arts
M = Mechanical Drawing, S = Science, T = Trigonometry, Wd = Woodshop, Wel = Welding. An "*" indicates that course is required, all others are recommended.

Application Frequency: Open = applications are accepted almost every day, consult program sponsor for time and hours. **Written/Oral Examinations** vary considerably in content, so applicants should consult program sponsor for further information.

Program Hours are cumulative over the duration of program. OJT = On-The-Job, Class = In classroom or at training facility

Placement: Apprentices are typically placed in three ways - In order from the top of a ranked list; Dispatched from local union; or Licensed to seek an employer on their own.

Bay Area Apprenticeship Coordinators Association
Workforce Investment San Francisco
June 2003

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

Research Brief:

Overview of City College of San Francisco

June 2003

Executive Summary

This Research Brief provides an overview of the critical role that City College of San Francisco (CCSF) plays in San Francisco's workforce development system.

Summary of Findings

- City College is the single largest provider of adult education and training in the City with more than 100,000 students annually. English-as-a-Second Language and vocational programs alone each enroll more than 20,000 every Fall, eclipsing the level of service provided by other institutions in those areas. Basic remedial education and computer courses enroll another 5,000 each.
- Most CCSF students are older, part-time or non-credit students, not initially seeking a degree. Only 11% attend full-time, more than half are over the age of 30, and many (if not most) do not have the attainment of a degree as their primary goal.
- City College provides a unique structured bridge to higher education and well-paid jobs from the rest of the workforce development system by combining credentialed academic, basic, language, occupational, and work-based learning, especially through on-going relationships with several community-based organizations.
- City College provides a variety of supportive services for its students, but these services are not as extensive as those found at community-based or labor organizations.
- The College's curriculum is broadly responsive to industry changes through industry advisory committees and customized/contract training, though the absence of mechanisms for directly tracking students' employment outcomes (e.g. job placement and wages) hampers its ability to measure its proficiency at filling labor market needs.

These factors, combined with its geographic accessibility and affordability, underscore City College's importance to San Francisco's adult workforce development system.

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Who: Goals, Age, & Background 3
What: Programs & Services 4
How: Resources, Partnerships, Access 5
After City College 6
Summary & Recommendations 7

Recommendations to San Francisco's Workforce Development Community

1. Develop an overall cross-institution workforce development plan for the City, with City College programs a key element, in order to identify and address system-wide service gaps and redundancies.
2. a. Develop structured partnerships with business organizations and local government entities to regularly articulate the short and long-term workforce needs of San Francisco's employers.
   b. Help develop a statewide mechanism to track employment outcomes of community college students.
3. Continue to build more formal relationships between City College and community-based organizations (CBOs) and other employment service providers in the One-Stop System. Schedule flexibility to accommodate working students should be an integral element of these partnerships.
4. Prioritize the preservation and expansion of the College's language, basic skills, and vocational offerings, which eclipse the amount of service provided in these areas by other institutions.

Research Briefs are prepared periodically to inform the workforce and economic development communities about various topics related to San Francisco's labor market, economy, and workforce development system. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

This report was written by Kevin Stange, Research Analyst for WISF (p: 415-557-6569; *kevin_stange@ci.sf.ca.us*). The author would like to thank Dr. Phillip R. Day Jr., Robert Gabriner, Phyllis McGuire, Pamela Mery, and Steve Spurling of City College whose guidance, analysis, and feedback made this report possible.

Introduction

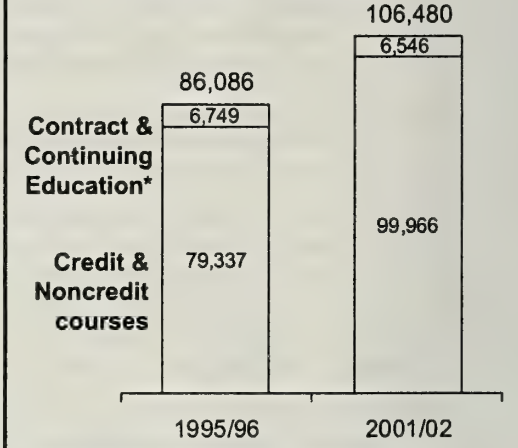
Community colleges play a key role in the higher education and adult workforce development systems in the United States and San Francisco is no exception. This report provides an overview of the City College of San Francisco (CCSF) – its size and reach, population served, education offered, how this education is provided, and the post-training experiences of its students – in order to better describe its role in educating San Francisco's residents. This report is third in a series of reports published by Workforce Investment San Francisco (WISF) that profile major elements of San Francisco's adult workforce development system, including training provided by community-based organizations, employers, labor organizations, and community colleges.

All of the information presented herein was obtained directly from the City College of San Francisco's Office of Research, Planning, and Grants. Most of the following data can be found on their website at *www.ccsf.edu/Offices/Research_Planning.*

How much education and training does City College provide?

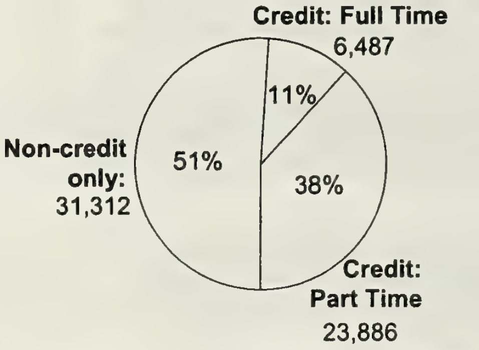
Every year, more than 100,000 people are educated or receive training through City College of San Francisco, primarily through one of its thousands of credit and non-credit courses, many of which are offered year-round and during the day and evenings. With more than 8% of San Francisco adults enrolled every fall, City College is a critical mechanism through which San Franciscans continually develop their skills and interests throughout life. In fact, only the training directly provided or sponsored by San Francisco's 42,000 employers reaches more people every year.[1] A steady 3.2% annual increase in enrollment over the past five years allowed the College to surpass the 100,000-student mark in 2000/01.

Total Students Enrolled Annually
City College of San Francisco



* Also includes CACT/Garment 2000 and Institute for International Students programs

Credit and Noncredit Students Enrolled
Fall 2000



For most students, education at City College is a supplement to their work, family, and other life commitments. Of the 60,000 credit and noncredit students in the Fall of 2000, only 11% were enrolled full time (at least 3 courses) for credit. Almost 40% were enrolled part time and more than half were taking non-credit courses exclusively. Unlike most baccalaureate institutions, City College is not just a place for college-track recent high school graduates, but a resource to meet the entire City's diverse educational, training, and learning needs.

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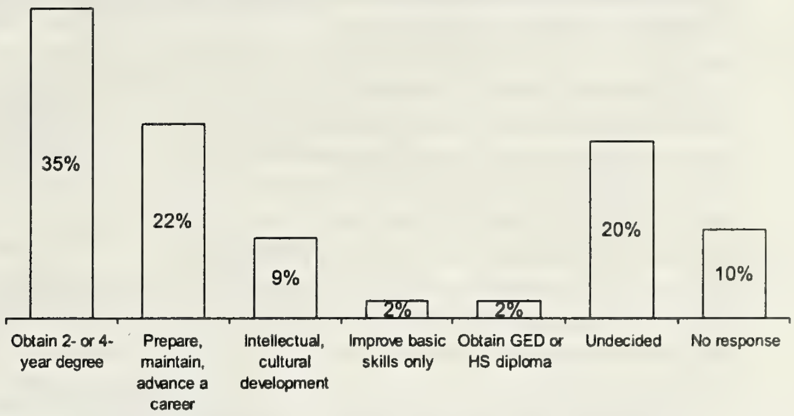
[1] As described in *Research Brief: Employer Provided Training*, it is estimated that San Francisco employers directly spent about $620 million dollars (2% of payroll) training between 210,000 and 390,000 San Francisco workers in 2000. This report is available at *www.picsf.org/research.*

Who does City College serve?

In City College's classrooms, one finds recent high school graduates looking to obtain a degree or find a career, experienced workers seeking advancement, dislocated workers and others switching careers, recent immigrants acculturating to US language and culture, adults looking to improve their basic skills, and others just looking for intellectual and cultural development. Many others – more than 20% of credit students alone – do not have a specific goal in mind when they enroll. This finding is consistent with trends among students who access community colleges nationally. The educational goals of non-credit students, most of whom are enrolled in English language, basic education, and personal enrichment courses, has proven difficult to track but is likely to be just as diverse.

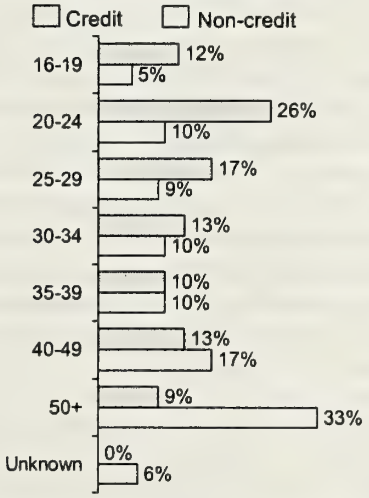
Educational Goals at Time of Enrollment
Credit Students, Fall 2000



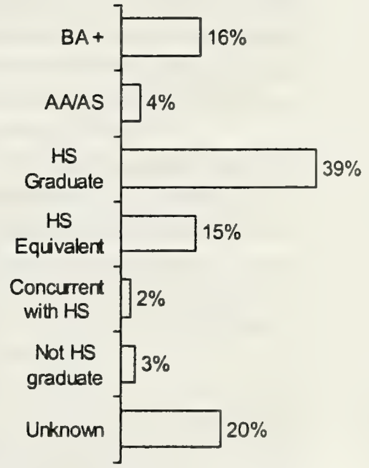
NOTE: Does not include noncredit students, most of whom are enrolled in English language, basic education, and personal enrichment courses

This diversity of goals reflects the vastly different life-stages and educational experience of City College's student body. While the majority of credit students are under the age of 30 – and a quarter are in the prime college age of their early twenties – a significant number are experienced adults returning to the classroom. Older workers are particularly numerous in not-for-credit courses.

Age of Students, Fall 2000



Educational Background
Credit students, Fall 2000

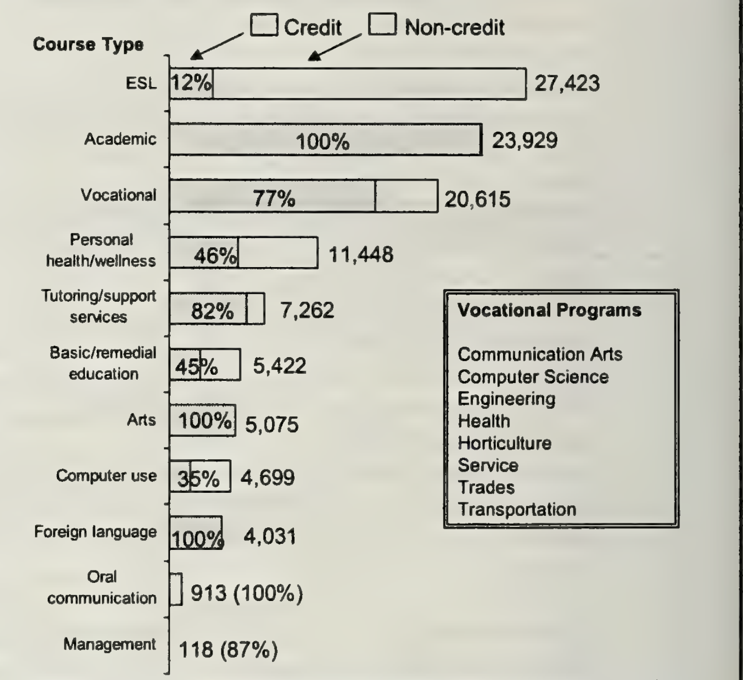


High school graduates (and equivalent) make up the largest share of credit students and many are even more educated; at least one in five already possesses a 2- or 4-year degree. The educational attainment of most non-credit students is unknown.

What type of education and training does City College provide?

City College offers a broad array of credit and non-credit coursework to accommodate the diverse training and educational needs of San Francisco's adults.[2] The College is the largest provider of language and basic remedial education in the City, with more than 27,000 student enrollments in ESL in the Fall of 2000, and at least 3,000 in basic skills training, primarily on a non-credit basis.[3] The College also directly enhances the job skills of San Francisco's workforce through its extensive vocational, computer, communications, and management coursework, which together enroll more than 25,000. Vocation-specific coursework caps off the more than one hundred credit- and non-credit vocational education programs offered by the College in the fields of Communication Arts, Computer Science, Engineering, Health, Horticulture, Service, Trades, and Transportation.

Number of Enrollments, Fall 2000



NOTE: Figures reflect number of unique enrolments in a subject during the Fall of 2000, not unique students served in that time period. Students that enrol in several subjects simultaneously are counted separately for each subject. Non FTES or ADA classes for employers are not included.

Credit-bearing academic courses in English, Math, Science, Social Science, and the Humanities underlie Associate degree and vocational programs and prepare students to transfer to baccalaureate institutions. Academic coursework constitutes nearly 24,000 enrollments every Fall. The college is also a tremendous community resource for personal enrichment, health, and wellness. Enrollment in art and foreign language courses tops 5,000 and 4,000, respectively, and more than 12,000 enroll in personal fitness, health, and nutrition courses every Fall.

To help its students succeed, City College offers selected support services to its broad student body and to specific subgroups. For instance, all students may take advantage of the career and academic counseling, financial aid, tutoring, health, and employment services offered by the college. More than 5,000 students took advantage of the College's Learning Assistance tutoring program in the Fall of 2000. In addition, the

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[2] The broad course categories discussed below were created by the author with the guidance of City College staff for the purpose of compiling this report, but are not regularly tracked by City College. In fact, the distinction between academic and vocational coursework continues to diminish.

[3] Figures reflect number of unique enrollments in a subject during the Fall of 2000, not unique students served in that time period. Students that enroll in several subjects simultaneously (either within or across the broad categories listed) will be counted separately for each subject. For example, unpublished analysis by City College staff suggests that approximately 22,000 unique students account for the 27,000 ESL enrollments during Fall 2000.

College offers more intensive support services for many individuals including CalWORKs clients, students with disabilities, parents, homeless individuals, veterans, and other low-income adults. While these serves are available, not all eligible students take advantage of them. For instance, only students taking 9 or more units are required to receive matriculation services (e.g. placement test and orientation), though many more would surely benefit from them. Partnerships with other community organizations (see below) have been one successful way of extending support services to many special populations.

How are services provided?

The College strives to make its programs accessible to all San Francisco residents and relevant to San Francisco employers. The College employs roughly 750 full- and 1200 part-time faculty, ranking it among the largest employers in the city. The vast majority of credit students enroll at the College's BART and MUNI-accessible main campus at Ocean Avenue, but many courses are offered at its nine other major campus locations and more than 100 other instructional sites throughout the City. Because of their proximity to major public transportation hubs, classes are fairly accessible from anywhere in the City. In addition, the College's Contract Education and Distance Learning programs bring instruction to students' workplace and homes. The modest $11 per unit charge for California residents (and no charge for most non-credit offerings), a small fraction of the College's $150 million annual budget, means that tuition is affordable too.[4] Like any other educational program, the largest cost for working adults attending City College is their lost income while in school. The majority of the College's revenue is from State general appropriation funds and local sales taxes.

City College Resources
Faculty
Full-time: 754
Part-time: 1200
Budget
$150 million in 2001/02

City College Accessibility
Locations
10 Main campuses
100 Other sites
Worksites (Contract Education)
Home (Distance Learning)
Cost [4]
Credit course: $11/credit
Non-credit courses: Free
Hours of Instruction
Days, Evenings, Weekends

Collaboration with businesses and the community is a key ingredient in the success of many City College programs. Industry Advisory Committees advise all vocational programs to ensure that curriculum is relevant to the needs of employers and on-going business partnerships ensure that students have access to internships and employment opportunities during and following their programs. The College's biotechnology training program, for instance, has partnered with local biotech firms including Genentech, Chiron, and Applied Biosystems for curriculum development, internships, guest instructors, and equipment donation. Collaboration with the San Francisco Chamber of Commerce has also ensured that the program supports the city's broader economic development effort in the area of biotechnology. The College's Office of Contract Education provides an additional mechanism to partner with business, providing flexible and customized training to private and public employers throughout San Francisco, including major banks, hospitals, grocery store chains, manufacturing companies, hotels, and many others.

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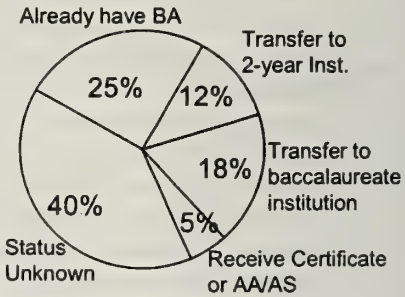
[4] Due to California's severe budget deficit, community college fees throughout the State may double in the Fall of 2003. While the community college system may still remain the most affordable post-secondary educational option, this fee increase is likely to limit enrollment, particularly among San Francisco's lowest-income residents. At the time of this publication, the Governor's May Revised 2003/04 Budget proposes to raise fees from $11 to $18 per credit.

Partnerships with community organizations also provide additional support for City College students. A recent survey found that City College provides the training for about one-third of the employment and training programs operated by community-based organizations (CBOs) in San Francisco.[5] Under this arrangement, CBOs provide job readiness, career guidance, placement, and follow-up services to complement the "hard" skills training received by students at City College. For instance, recent immigrants enrolled in City College's Licensed Vocational Nurse (LVN) Refresher course can receive Vocational ELS (VESL) training as well as counseling from Jewish Vocational Services (JVS). JVS also helps place students once they graduate and pass the LVN licensing exam.

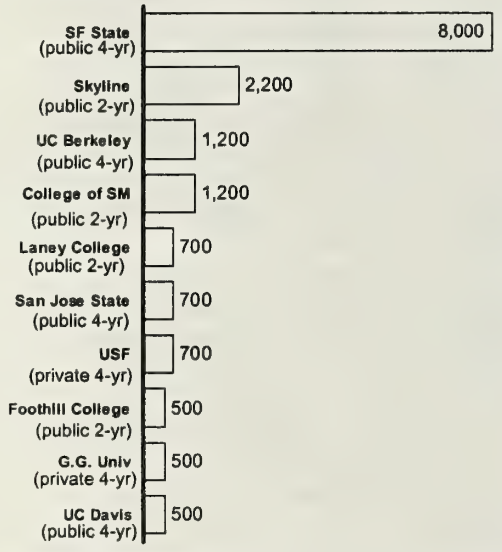
What happens after City College?

Since students have such a wide range of personal reasons for enrolling in City College, no single measure – nor handful of measures – can appropriately characterize what happens to students once they leave. Much attention is paid to community colleges' role in preparing students for Bachelors degree programs, and this is an important function of City College too. More than 20,000 students transferred from City College to other institutions between 1997 and 2001, almost 30% of the total credit students who left City College during that time. Together with the 5% who exited with a Certificate or Associates degree, many City College students are getting closer to their stated goal of obtaining a 2- or 4-year degree.

Post-City College Outcomes
All Students Leaving City College, 1997-2001



Top Transfer Destinations
Number of Transfers from City College, 1997-2001



San Francisco State University is the most common destination, followed by Skyline Community College, UC Berkeley, and College of San Mateo. The frequency of transfers between community colleges suggests that for many students, City College is but one of several regional colleges used to obtain their post-secondary education.[6] The traditional model of a student using one community college to transfer to one baccalaureate institution is apparently not true for many community college students and national post-secondary education more generally.

Much less is known, however, about the post-education experiences of the majority of students, whose goal was not to obtain a degree. Many students have acquired additional skills that will allow them to advance or change direction in their careers. For the approximately 854 individuals who receive a GED every year, this change can be very significant. This credential opens up a broad array of employment options previously unavailable. For the thousands who learn to use basic spreadsheet, word processing, and database software, however, the career evolution may be more gradual. An administrative assistant, for instance, may increasingly assume more analytical responsibilities and eventually be promoted to an analyst position – a role impossible without the training received at City College.

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[5] See WISF publication *Building Tomorrow's Workforce: Community-based Adult Employment and Training Programs in San Francisco* (2002), available at www.picsf.org/research.

[6] City College not only transfers many students to regional community colleges, but also receives a significant number of transfer students from other colleges in return.

Unfortunately, mechanisms to track the wage and employment paths of all former City College students are not yet in place. The Business Department does track placements resulting from its job development service – an average of 205 students were placed in jobs every year over the past five years, at an average wage of $12.95 per hour – but similar tracking mechanisms are not present for the College broadly. To be successful, such a comprehensive system would need to be developed and integrated within the context of a statewide database and tracking system for all students, with leadership and funding for such a system also coming from the State.

At least one fact is known about City College's students – the College continues to play a significant role in their skill development throughout their lives. More than 17% of credit students are former CCSF students, returning to the College for more education after some time away.

Summary

City College of San Francisco plays a key role in San Francisco's adult education and workforce development system.

- City College is the *single largest provider of adult education and training* in the City with more than 100,000 San Franciscans enrolled in its courses every year. English-as-a-Second Language programs alone enroll more than 20,000 every Fall, as do the College's vocational programs. Basic remedial education and computer courses enroll another 5,000 each.
- *Most CCSF students are older, part-time or non-credit students not initially seeking a degree*. Only 11% attend full-time, more than half are over the age of 30, and many (if not most) do not have the attainment of a degree as their primary goal. Students have a diversity of other goals for their City College experience: career advancement, personal development, and improved English proficiency are among the most common.
- City College provides a unique *structured bridge to higher education and well-paid jobs* from the rest of the workforce development system by combining credentialed academic, basic, language, occupational, and work-based learning, especially through on-going relationships with several community-based organizations. At least 30% of students continue their education after leaving City College by transferring to baccalaureate institutions or other community colleges.
- Though students' income lost from not working while in school will always remain a huge barrier to working adults returning to school, City College will likely remain one of their most affordable options.

- City College provides a variety of *supportive services* for its students. However, these services are not accessed by everyone and may not be as extensive as that found at community-based or labor organizations.
- The College's industry advisory committees and customized/contract training allows it to be *responsive to broad industry changes*, though the absence of mechanisms for directly tracking students' employment outcomes (e.g. job placement and wages) hampers its ability to measure its proficiency at filling employers' and workers' specific skill needs.

Observers have cited many of these positive characteristics to make the case for an increased role of community colleges generally in the adult workforce development system.[7] Successful training programs for low-income adults, they say , offer a full range of coursework and different programs reflecting the diverse needs of their clients, respond to labor market changes, provide adequate supports, provide pathways to further education, and continuously improve their quality. In San Francisco, City College's size, geographic accessibility, and affordability underscore its importance.

Recommendations

Given its size, breadth of offering, and accessibility, City College will continue to be a crucial component of San Francisco's extensive workforce development system – a system that also includes San Francisco's employers, government service providers, community-based organizations, labor organizations, and other private schools. The key challenge for this system and for City College itself is to ensure that all San Franciscans access the tremendous resources of the College and that all elements of the workforce development system are working in sync to fill the needs of San Francisco's residents and employers in the most effective and efficient manor. To achieve this objective,

1. City College should help lead the development of an overall workforce development plan for the City. A cross-institution strategic planning process is the only way that system-wide service gaps and redundancies can be identified and addressed. The Workforce Investment San Francisco Board is a natural forum for this process to take place and the College's size and reach makes its assumption of a leadership role an imperative.
2. This plan should be driven by the education and training needs of San Francisco's employers and residents and informed by an assessment of employment outcomes of current programs. This will take:
    - Structured partnerships with business organizations such as the Chamber of Commerce and government entities such as the Mayor's Office of Economic Development, the SF Redevelopment Agency, the SF Planning Department, and the California Employment Development Department to regularly articulate the short and long-term workforce needs of San Francisco's employers.

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[7] See Golonka, Susan and Lisa Matus-Grossman (2001) "Opening Doors: Expanding Educational Opportunities for Low-Income Workers" Manpower Demonstration Research Corporation; and Grubb, W. Norton (2001) "Second Chances in Changing Times: The Roles of Community Colleges in Advancing Low-Skilled Workers." in *Low-Wage Workers in the New Economy*. Washington DC: The Urban Institute Press, 2001.

- A statewide mechanism to track employment outcomes of City College (and other California community college) students. While educational outcomes such as degree or certificate attainment and transfer rates are tracked extensively, no similar mechanism is available to track the outcomes for the vast majority of community college students, who cite career advancement and other non-credential goals.

3. The College should continue to build more formal relationships with community-based organizations (CBOs) and other employment service providers. Collaborative training programs for which CBOs provide basic and remedial education, support, and job assistance to CCSF students have been successful ways of extending support services to more CCSF students, while making post-secondary education more accessible to low income San Franciscans. The City's One Stop System provides employment services to thousands of job seekers every month – City College should ensure that its students continue to access these valuable services. Schedule flexibility to accommodate working students should be an integral element of these partnerships.
4. The College should prioritize the preservation, expansion, and integration of its language, basic skills, and vocational offerings, which eclipse the amount of services, provided in these areas by other institutions.

* * * * *

The College is already moving forward on many of these directives. For instance, among the eight priority areas identified in its Strategic Plan for 2003-2008 are[8]:

- Improvements in the areas of basic skills, remediation, and academic support;
- Expanding programs to meet the needs of workforce, economic, and community development;
- Increasing access through expanded outreach, recruitment, marketing, and promotion, partially through partnerships with community-based organizations

Its success in these areas depends critically on the support of San Francisco's broad workforce development community.

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[8] For a full description of all eight priority areas, see *City College of San Francisco Strategic Plan 2003-2008* (Adopted February 27, 2003) available at *www.ccsf.edu/Offices/Research_Planning/pdf/strpln3.pdf*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT SF BOARD **DATE:** JUNE 11, 2003

FROM: LYNN BUNIM, CHAIR, EXECUTIVE COMMITTEE

SUBJECT: ACCEPTANCE OF CDBG FUNDS TO OPERATE THE TAX CREDIT VOUCHERING PROJECT (AGENDA ITEM 6A)

The WISF Board is asked to ratify Executive Committee's decision to accept the Community Block Grant to continue operation of the Tax Credit Vouchering Project.

The Executive Committee met today, solicited public testimony, and adopted the recommendation. I am forwarding the Executive Committee recommendations to you for your approval.

BACKGROUND

Since 1998, the Private Industry Council of San Francisco, Inc. (PIC) has received Community Development Block Grant (CDBG) funds from the Mayor's Office of Community Development to operate the Tax Credit Vouchering Project for San Francisco as the result of an interagency plan developed by the City and County of San Francisco Department of Human Services; the Mayor's Office of Community Development; the Mayor's Office of Economic Development; the State of California Employment Development Department; the Mission Economic Development Association; the Recycling Market Development Zone; and, the PIC.

This project is designed to provide employers with easy access and technical assistance on various hiring tax credits available to San Francisco employers. The project provides a single point-of-contact through the Tax Credit hotline and website. The project also serves as the portal for the City's sfbizinfo.com users to access tax credits and other workforce related information.

One tax credit voucher issued is issued for each appropriate new job placement. The PIC issued over 8000 tax credit vouchers from 1999 - 2002. Significantly, since 1999 over 8000 jobs have been filled by economically disadvantaged San Franciscans!

It is difficult to determine the precise dollar value of the credits to San Francisco businesses during this period. Unknown variables, including length of employment and hourly wage are factors that determine the exact value of tax credits to business. However, using conservative values for these factors – assume that all of the 8000 employees worked for six months at the minimum wage - *the total tax value of these tax credit to businesses is no less than 26 million dollars.*

RECOMMENDATION

This project is without a doubt, vital to the City's economic and workforce development efforts. Executive Committee recommends that the WISF Board accept this grant to continue to receive this valuable service.

Staff will be present at your June 18th meeting. If you have any questions prior to the meeting, please call Lucia Hughes at 415-861-4002.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

RESOLUTION TO ACCEPT A COMMUNITY DEVELOPMENT BLOCK GRANT FROM THE MAYOR'S OFFICE OF COMMUNITY DEVELOPMENT TO FUND THE TAX CREDIT HOTLINE/ ENTERPRISE ZONE VOUCHERING PROJECT

WHEREAS the City has entered into a Grant Agreement with the US Department of Housing and Urban Development (HUD) to receive Community Block Grant funds and Emergency Shelter Grant Program ("ESGP") funds, and to administer the distribution of the CDBG funds pursuant to Title I of the Housing and Community Development Act of 1974, as amended, and the ESGP funds pursuant to the McKinney Homeless Assistance Act, as amended.

WHEREAS under the above Acts and the City-HUD Grant Agreement, the City is authorized to distribute CDBG Funds and ESGP Funds (collectively, the "Funds") to certain community-based nonprofit corporations for the specific and special purpose of achieving the goals of the City's Community Development Program.

WHEREAS under that agreement, the Mayor's Office of Community Development has allocated $70,000 of the Community Development Block Grant to the Private Industry Council of San Francisco, Inc. to continue the Tax Credit Hotline/ Enterprise Zone Vouchering project for Program Year 2003-2004.

WHEREAS under that agreement, the Private Industry Council of San Francisco, Inc. is to provide assistance to employers in San Francisco on tax credit information, provide linkages between employers and tax credit eligible job seekers, and increase the overall job opportunity access for job seekers.

BE IT THEREFORE RESOLVED THAT representatives of the Private Industry Council of San Francisco, Inc. are authorized to enter into a contract with the Mayor's Office of Community Development to continue that program.

Lynn Bunim
WISF Board and Executive Committee Chair

Date

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT SF BOARD **DATE:** JUNE 11, 2003

FROM: LYNN BUNIM, CHAIR, EXECUTIVE COMMITTEE

SUBJECT: SELECTION OF WIA PROPOSALS FOR PY 2003-04 SERVICES TO ADULTS WITH MULTIPLE BARRIERS (Agenda Item 7A)

The WISF Board is asked to approve funding recommendations for Workforce Investment Act (WIA) Program Year 2003-04 group-based subcontracts for special adult populations with multiple barriers to employment.

The Executive Committee met today, solicited public testimony, and reviewed the Program Resources Committee's funding recommendations. I am forwarding the Executive Committee recommendations to you for your approval.

BACKGROUND

In response to a Request For Proposals, thirty-five (35) competitive proposals were received on April 14. The proposals requested, in aggregate, $5,944,833. The average proposed cost per enrollment was $4,753; the average proposed cost per placement was $7,539.

FUNDS AVAILABLE

The following recommendation proposes the obligation of $1,222,015 for group-based cost reimbursement subcontracts to provide training for job seekers with multiple barriers to employment.

This amount is comprised of $1,084,122 (as shown below) plus $137,893 of the $300,000 Employer-directed training fund.

$300K taken off the top before % are calculated for Oper. & One Stop only

WIA Adult PY 03-04 Allocation	**$ 2,688,717**					**Dollar**
					Total %	**Decrease**
PIC Admin	$ 268,872			$ 268,872	**10.0%**	**0**
PIC Operation/Management	358,308			358,308	**13.3%**	**(45,000)**
One Stop Support **(No Cap)**	310,533			310,533	**11.5%**	**(39,000)**
WIA Training	1,751,005					**(84,000)**
	$ 2,688,717					
Employer-directed 20% of 62% **(With Cap)**		$ 300,000		300,000	11.2%	
Part. Support Pool (Childcare, Txport.)		175,567		175,567	6.5%	
Job Seeker-directed 80% of 62%		1,275,438				**84,000**
		$ 1,751,005				
Cost Reimbursement 85% of 80%			$ 1,084,122	1,084,122	40.3%	
I.R. 15% of 80%			191,316	191,316	7.1%	
			$ 1,275,438	$ 2,688,717	100.0%	

RECOMMENDATIONS

The attached funding recommendation is comprised of **sixteen proposals scoring 85 points or more**. The recommendation anticipates **270 enrollments** and includes two "first-time" WIA Adult services subcontractors.

Two of the proposals meet the "customized training" criteria adopted by the WISF Board and are therefore recommended for the Employer-directed training fund.

The Executive Committee also recommends the allocation of WIA Program Year '02 – '03 carry forward funds to the recommended subcontracts on a pro-rata basis.

The Executive Committee further recommends that its Finance Subcommittee consider using unexpended PY '02 – '03 One Stop funds for training.

Staff will be present at your meeting on June 18. If you have questions prior to the meeting, please call Wes Dixon at 923-4261.

Attachment

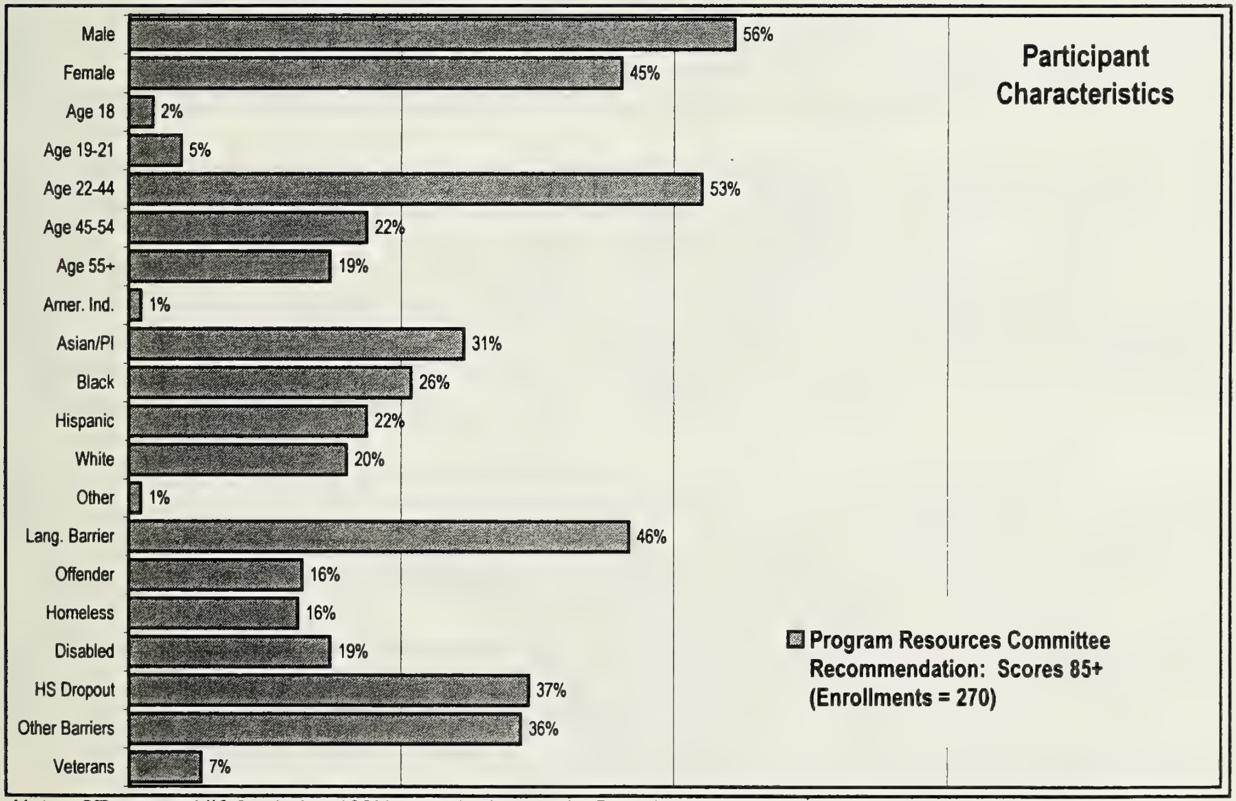
cc: Proponents

Program Resources Committee Recommendation: Scores 85+ (Enrollments = 270)

			Proposed Cost & Performance					PY'03-'04 Recommendation			
	P#	Proponent	Total $ Requested (Capacity)	Total Enr.	Total Plc.	Plc. Rate	Score	Rec. Enr.	Subcontract	Training Setside	PY'03 Recommended Budget
*	**13**	Arriba Juntos	171,570	40	32	80%	**95**	26	109,445		109,445
*	**4**	Self-Help for the Elderly	72,000	16	14	88%	**95**	9	42,503		42,503
*	**14**	Arriba Juntos (OJT Pgm.)	123,238	40	32	80%	**93**	28	87,450	74,084	161,534
*	**18**	Rehab. Svcs. of No. CA (SFVS)	243,527	40	28	70%	**92**	9	57,644		57,644
*	**10**	No. California Service League	170,787	43	30	70%	**91**	22	86,432	39,759	126,191
*	**33**	Swords to Plowshares	100,000	28	22	79%	**90**	18	65,002	19,501	84,503
**	**17**	Young Community Developers	122,000	20	18	90%	**90**	10	59,780	24,510	84,290
**	**9**	Jewish Vocational Service	31,139	12	9	75%	**90**	12	31,139	22,464	53,603
*	**3**	Self-Help for the Elderly	199,200	48	45	94%	**90**	36	147,408		147,408
*	**23**	Haight Ashbury Food Program	164,770	22	18	82%	**88**	6	44,400		44,400
*	**25**	Intercultural Institute of California	160,246	40	35	88%	**87**	20	81,819		81,819
*	**28**	Board of Trustees, Glide Found.	92,700	18	14	78%	**86**	8	38,948		38,948
*	**21**	Asian Neighborhood Design	133,972	25	20	80%	**86**	10	53,393		53,393
*	**22**	Positive Resource Center	87,257	72	43	60%	**86**	31	37,916		37,916
*	**34**	Haight Ashbury Food Program	70,135	9	7	78%	**85**	4	32,453		32,453
*	**27**	Mission Lang. and Voc. School	371,645	120	90	75%	**85**	21	65,966		65,966
		* Recommended subcontracts using Job Seeker Directed funds =						**248**	950,779	133,343	**1,084,122**
		** Recommended using Employer Directed funds =						**22**	90,919	46,974	**137,893**
		RECOMMENDED TOTAL =						**270**	1,041,698	$ 180,317	**$1,222,015**
		BALANCE OF $1,222,015 AVAILABLE =									**(0)**

Advantages: More individuals served. Continues most current subcontractors. **Avg. cost/enrollment = $ 4,526**

Disadvantages: More subcontracts. **No. of Subcontracts = 16**



Note: CT proposal #9 funded at 100% capacity (request). Remaining proposals at 72%-109% of PY'02 award.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT SF BOARD **DATE:** JUNE 11, 2003

FROM: LYNN BUNIM, CHAIR, EXECUTIVE COMMITTEE

SUBJECT: FUNDING RECOMMENDATIONS FOR WIA TITLE 1B SUBCONTRACTORS, PY 2003-2004 (AGENDA ITEM 7B)

The WISF Board is asked to approve the allocation of $1,893,934 of WIA 1B (Formula) funds to the subcontractors listed on Table I for Program Year 2003-2004. In addition, the WISF Board is asked to approve the set aside of $100,000 for Childcare, $100,000 in Support Services and $35,000 for capacity building/staff development in WIA 1B funds for Program Year 2003-2004.

The Executive Committee met today, solicited public testimony, and adopted the recommendations. I am forwarding the Executive Committee recommendations to you for your approval.

BACKGROUND

At the March 27, 2003 Youth Council meeting, the Council discussed the youth services process for awarding funds to subcontractors in good standing eligible to receive such funding based on the December 2001 RFP. At that meeting, the Council agreed to the concept of baseline or ‘sustainability’ funding combined with performance funding adjusted to available funds. In addition, the Council adopted a Performance Analysis template to be used for subcontractors to analyze their performance and guide the awarding of performance dollars.

At the Youth Council meeting of April 9, 2003, the Council adopted a funding approach that would base 75% of WIA 1B Program Year 2003-2004 funding on Program Year 2002-2003 funding for subcontractors in good standing, and 25% on performance. A ‘good standing’ criteria to qualify for the adopted 75% baseline funding was subsequently adopted as a way to ensure that the subcontractor has demonstrated the ability to implement a viable program design resulting in the recruitment, enrollment and engagement of youth. It was also agreed that the performance evaluation period should be based on the most current two quarters of performance for new subcontractors.

At the Youth Council meeting of April 24, 2003, the Council adopted a WIA 1B the Youth Program Performance Analysis format, elements, and values or weights for each of the elements as follow: 50% of the performance funding to be based on performance against goals (i.e., ‘actual’ versus ‘planned’) with 30 points given to enrollment and 10 points given for each of the other two outcome measures. An additional 20 points were divided equally among demonstrated progress in staff development, coalitions & collaborations, service to high-risk youth, and connections to schools, and 3 points were assigned to successful implementation for each of the required WIA Title 1B Youth Program elements. These elements were equally important and represent the real core of a comprehensive youth development experience as

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800 735.2929 (CRS)

outlined by the Workforce Investment Act. In total, they represent 30 points, or almost as much as the performance goals section.

In summation, 50% of the Performance Analysis value is given to contractual goal attainment, 5% each to capacity building, collaborations and coalitions, connections to schools and service to high-risk youth, and 30% to implementation of the WIA Title 1B Youth Development Program elements. This represents a properly balanced approach to assessing an individual contractor's actual ability to serve youth, improve their quality of service, and implement a comprehensive youth program model.

On May 22, 2003, the Youth Council met to review funding recommendations for WIA 1B subcontractors based on the 75% baseline funding and the 25% performance component of the funding mechanism described above. The Council adopted funding recommendations as follows: $100,000 for Childcare, $100,000 for Other Support Services, $35,000 for Capacity Building/Staff Development, $40,000 to be awarded to International Institute of San Francisco, and the rest of the allocation for funding as detailed in Table I.

STRATEGIC CONSIDERATIONS

The WIA requires that a minimum of 30% of WIA youth dollars be directed to out-of-school youth. The recommendations herein outlined achieve a 66.78% allocation to subcontractors serving out-of-school youth. In addition, WIA 1B has no residency requirement, but does have a low family income eligibility requirement. The recommendations provide for a geographic diversity and will serve many low-income areas of San Francisco.

RECOMMENDATIONS

The Executive Committee recommends that $1,893,934 of WIA Title 1B (Formula) funds be committed to the specific subcontractors as indicated in Table 1 for Program Year 2003-2004. In addition, the Executive Committee recommends that $100,000 be set aside for Childcare, $100,000 for Support Services and $35,000 for System Capacity Building and Staff Development. This recommendation is contingent on the continuing availability for WIA Title 1B youth funds in an amount necessary to meet current and future needs and obligations.

Attachment

PIC STAFF RECOMMENDATIONS
WIA TITLE 1B YOUTH PROGRAMS
July 1, 2003 - June 30, 2004

	PERFORMANCE ANALYSIS TALLIES																					
	Enrollmentt	Entered	Return to School	Staff Dev	C & C	High-RiskYouth	Connection to Schools	Element 1	Element 2	Element 3	Element 4	Element 5	Element 6	Element 7	Element 8	Element 9	Element 10	Performance Analysis Total Score	Dollar Amount Per Point	PY 03/04 25% Competitive Recommended Amount	PY 03/04 TOTAL RECOMMENDED AMOUNT	PY 03/04 REC SVC LEVEL
4,009	30	10	10	5	5	5	5	3	3	3	3	3	3	3	3	3	3	100	$1,027	$102,740	$206,750	49
8,212	28	6	2	5	5	5	5	3	3	3	3	3	3	3	2	3	3	85	$1,027	$87,329	$185,541	85
2,824	36		14	3	5	5	5	3	1	3	3	3	3	3	3	3	0	93	$1,027	$17,608	$70,432	15
2,995	23	10	10	3	5	5	5	3	3	3	3	1	3	3	3	3	3	89	$1,027	$91,439	$164,434	29
4,205	30	10	10	5	5	5	5	3	3	3	3	1	3	3	3	3	3	98	$1,027	$100,686	$194,890	87
6,550	30	0	10	3	5	5	5	3	1	3	3	3	3	3	3	3	0	83	$1,027	$85,274	$141,824	28
9,849	21	9	10	4	3	5	5	3	3	2	3	3	3	3	3	3	3	86	$1,027	$88,357	$178,206	30
7,227	21	5	10	3	3	5	4	3	3	3	3	3	3	3	3	3	3	81	$1,027	$83,220	$140,447	37
5,981	30	14		5	5	5	5	2	3	3	3	2	3	3	3	3	2	91	$1,027	$93,494	$139,475	27
9,149	15	10	10	5	5	4	5	3	3	3	3	1	0	3	3	3	3	79	$1,027	$81,165	$120,313	46
$0	0	0	0	2	3	5	5	3	3	0	1	0	3	0	3	3	2	33	$0	$0	$0	0
8,533	36	10		5	5	5	5	3	3	3	3	3	3	3	3	3	3	96	$1,027	$98,631	$157,164	50
7,727	30	10	10	4	3	5	3	0	0	2	1	2	3	3	0	3	2	81	$1,027	$83,220	$100,947	17
7,552	15	10	10															35	$1,027	$35,959	$53,511	23
$0	30	10	10	5	5	5	5	3	3	3	3	3	3	3	3	3	2	99	$0	$0	$0	0
																					$40,000	25
4,813																		1004		$1,049,121	$1,893,934	549

ises	$100,000
's. (Transp.Uniforms,Tools,Health,etc.)	$100,000
g/Staff Development	$35,000
Recommended 75% Base Funding	**$804,813**
ed 25% Competitive	**$1,089,121**
l #36 Adjustment *	**$17,608**
d to not exceed RFP proposed amount	
endation to fund Proposal #43	**$40,000**
ended 25% Competitive Funding	**$1,031,513**
Recommended Subcontract Funding	**$1,893,934**

FINAL SERVICE LEVELS WILL BE NEGOTIATED

[1] Numbers based on PIC MIS; no Performance Analysis submitted

[2] Did not meet 'good standing' criteria as established by the Youth Council

[3] Not eligible for funding in 2003-2004 - have been funded for 3 consecutive years and did not submit an RFP in PY 2002-2003

6/4/03

outlined by the Workforce Investment Act. In total, they represent 30 points, or almost as much as the performance goals section.

In summation, 50% of the Performance Analysis value is given to contractual goal attainment, 5% each to capacity building, collaborations and coalitions, connections to schools and service to high-risk youth, and 30% to implementation of the WIA Title 1B Youth Development Program elements. This represents a properly balanced approach to assessing an individual contractor's actual ability to serve youth, improve their quality of service, and implement a comprehensive youth program model.

On May 22, 2003, the Youth Council met to review funding recommendations for WIA 1B subcontractors based on the 75% baseline funding and the 25% performance component of the funding mechanism described above. The Council adopted funding recommendations as follows: $100,000 for Childcare, $100,000 for Other Support Services, $35,000 for Capacity Building/Staff Development, $40,000 to be awarded to International Institute of San Francisco, and the rest of the allocation for funding as detailed in Table I.

STRATEGIC CONSIDERATIONS

The WIA requires that a minimum of 30% of WIA youth dollars be directed to out-of-school youth. The recommendations herein outlined achieve a 66.78% allocation to subcontractors serving out-of-school youth. In addition, WIA 1B has no residency requirement, but does have a low family income eligibility requirement. The recommendations provide for a geographic diversity and will serve many low-income areas of San Francisco.

RECOMMENDATIONS

The Executive Committee recommends that $1,893,934 of WIA Title 1B (Formula) funds be committed to the specific subcontractors as indicated in Table 1 for Program Year 2003-2004. In addition, the Executive Committee recommends that $100,000 be set aside for Childcare, $100,000 for Support Services and $35,000 for System Capacity Building and Staff Development. This recommendation is contingent on the continuing availability for WIA Title 1B youth funds in an amount necessary to meet current and future needs and obligations.

Attachment

TABLE I
PIC STAFF RECOMMENDATIONS
WIA TITLE 1B YOUTH PROGRAMS
July 1, 2003 - June 30, 2004

								PERFORMANCE ANALYSIS TALLIES																					
Proposal #:	Proponent(s)	Requested RFP Amount	RFP Points	PY 02/03 Award	PY 02/03 Svc Level	In-School/Out-of School	PY 03/04 Recommended Base Funding	Enrollment	Entered	Return to School	Staff Dev	C & C	High-RiskYouth	Connection to Schools	Element 1	Element 2	Element 3	Element 4	Element 5	Element 6	Element 7	Element 8	Element 9	Element 10	Performance Analysis Total Score	Dollar Amount Per Point	PY 03/04 25% Competitive Recommended Amount	PY 03/04 TOTAL RECOMMENDED AMOUNT	PY 03/04 REC SVC LEVEL
99	Jewish Vocational Service	$206,785	96	$138,679	33	I&O	$104,009	30	10	10	5	5	5	5	3	3	3	3	3	3	3	3	3	3	100	$1,027	$102,740	$206,750	49
83	Larkin Street Youth Services	$216,851	94	$130,949	60	OS	$98,212	28	6	2	5	5	5	5	3	3	3	3	3	3	3	2	3	3	85	$1,027	$87,329	$185,541	85
36	**Young Community Developers ***	**$70,432**	**93**	**$70,432**	**15**	**IS**	**$52,824**	**36**		**14**	**3**	**5**	**5**	**5**	**3**	**1**	**3**	**3**	**3**	**3**	**3**	**3**	**3**	**0**	**93**	**$1,027**	**$17,608**	**$70,432**	**15**
78	Youth Treatment & Ed Court	$349 993	92	$97,327	17	OS	$72,995	23	10	10	3	5	5	5	3	3	3	3	1	3	3	3	3	3	89	$1,027	$91,439	$164,434	29
11	Step School-to-Career	$500,000	91	$125,606	56	IS	$94,205	30	10	10	5	5	5	5	3	3	3	3	1	3	3	3	3	3	98	$1,027	$100,686	$194,890	87
52	Young Community Developers	$899,200	91	$75,400	15	OS	$56,550	30	0	10	3	5	5	5	3	1	3	3	3	3	3	3	3	0	83	$1,027	$85,274	$141,824	28
108	Asian Neighborhood Design	$429,948	91	$119,799	15	OS	$89,849	21	9	10	4	3	5	5	3	3	2	3	3	3	3	3	3	3	86	$1,027	$88,357	$178,206	30
58	Lavender Youth Rec & Info Ctr.	$208,700	90	$76,303	20	OS	$57,227	21	5	10	3	3	5	4	3	3	3	3	3	3	3	3	3	3	81	$1,027	$83,220	$140,447	37
89	Golden Gate Community, Inc	$517,123	90	$61,308	12	OS	$45,981	30	14		5	5	5	5	2	3	3	3	2	3	3	3	3	2	91	$1,027	$93,494	$139,475	27
8	Horizons Unlimited of S F	$390,343	89	$52,198	20	I&O	$39,149	15	10	10	5	5	4	5	3	3	3	3	1	0	3	3	3	3	79	$1,027	$81,165	$120,313	46
100	**Youth Chance High School[2]**	**$148,647**	**89**	**$58,350**	**30**	**OS**	**$0**	**0**	**0**	**0**	**2**	**3**	**5**	**5**	**3**	**3**	**0**	**1**	**0**	**3**	**0**	**3**	**3**	**2**	**33**	**$0**	**$0**	**$0**	**0**
9	Mission Lang & Voc School	$281,974	88	$78,044	25	OS	$58,533	36	10		5	5	5	5	3	3	3	3	3	3	3	3	3	3	96	$1,027	$98,631	$157,164	50
2	The Family School	$368,276	87	$23,636	4	OS	$17,727	30	10	10	4	3	5	3	0	0	2	1	2	3	3	0	3	2	81	$1,027	$83,220	$100,947	17
106	Ingleside Community Center[1]	$90,360	86	$23,403	10	I&O	$17,552	15	10	10															35	$1,027	$35,959	$53,511	23
	Mission Hiring Hall[3]			**$53,863**	**9**	**OS**	**$0**	**30**	**10**	**10**	**5**	**5**	**5**	**5**	**3**	**3**	**3**	**3**	**3**	**3**	**3**	**3**	**3**	**2**	**99**	**$0**	**$0**	**$0**	**0**
43	International Institute of SF	$61,000	88			IS																						$40,000	25
	TOTALS:	$4,737,632		$1,185,297	341		$804,813																		1004		$1,049,121	$1,893,934	549

WIA Title 1B 2003-2004 Formula Youth Allocations		
PIC Administration	10%	$248,656
PIC Program Operations	15%	$372,984
One Stop System Support	13%	$323,253
Subcontractor Training & Support	62%	$1,541,668
TOTAL WIA TITLE 1B YOUTH 03/04 AWARD	100%	$2,486,561
Subcontractor Training & Support		$1,541,668
7/01-6/03 Uncommitted Funds		587,266
Subtotal		$2,128,934

Childcare Expenses	$100,000
Other Supp Svc's (Transp Uniforms,Tools,Health,etc)	$100,000
Capacity Building/Staff Development	$35,000
PY 03/04 Total Recommended 75% Base Funding	$804,813
Calculated 25% Competitive	$1,089,121
Proposal #36 Adjustment *	$17,608
*Adjusted to not exceed RFP proposed amount	
Recommendation to fund Proposal #43	$40,000
Recommended 25% Competitive Funding	$1,031,513
PY 03/04 Total Recommended Subcontract Funding	$1,893,934

FINAL SERVICE LEVELS WILL BE NEGOTIATED

[1] Numbers based on PIC MIS, no Performance Analysis submitted

[2] Did not meet 'good standing' criteria as established by the Youth Council

[3] Not eligible for funding in 2003-2004 - have been funded for 3 consecutive years and did not submit an RFP in PY 2002-2003

6/4/03

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WORKFORCE INVESTMENT SF BOARD **DATE:** JUNE 11, 2003

FROM: LYNN BUNIM, CHAIR, EXECUTIVE COMMITTEE

SUBJECT: FUNDING RECOMMENDATIONS FOR WIA TITLE 1D (YOG) SUBCONTRACTORS, PY 2003-2004 (AGENDA ITEM 7C)

The WISF Board is asked to approve the allocation of $1,178,211 of WIA Title 1D (YOG) funds to the subcontractors listed on Table II for Program Year 2003-2004, that in addition $510,000 be set aside for a combination of Youth-Related Expenses, Childcare and Transportation; that $373,093 be set aside for Individual Referrals; and that $575,000 be set aside for Site Service Agreements.

The Executive Committee met today, solicited public testimony, and adopted the recommendations. I am forwarding the Executive Committee recommendations to you for your approval.

BACKGROUND

At the March 27, 2003 Youth Council meeting, the Council discussed the youth services process for awarding funds to subcontractors in good standing eligible to receive such funding based on the December 2001 RFP. At that meeting, the Council agreed to the concept of baseline or 'sustainability' funding combined with performance funding adjusted to available funds. In addition, the Council adopted a Performance Analysis template to be used for subcontractors to analyze their performance and guide the awarding of performance dollars.

At the May 8th meeting, the Youth Council adopted the definition for 'good standing' for the YOG subcontractors as being 70% completion, with 'completion' being defined as "active participation on the part of the youth in the various activities, set training, or curriculum provided by a subcontractor as set and negotiated by the contract staff and the subcontractor".

PERFORMANCE ANALYSIS WEIGHTS.

At this same meeting, the Youth Council adopted the following performance values or weights breakdown: 20 for enrollment; 30 for employment; 30 for education or approved credential, 5 points each for Staff Development and 7.5 each for Coalitions and Collaborations and Connection to Schools.

At the May 22, 2003 Youth Council meeting, the Council reviewed the available budget for Program Year 2003-2004 WIA 1D (YOG) discretionary spending and adopted the following allocation: $1,178,211 for Subcontractor Services; $373,093 set aside for Individual Referrals; $510,000 set aside for a combination of Childcare, Transportation and Other Youth-Related Expenses; and $575,000 for Site Service Agreements.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
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STRATEGIC CONSIDERATIONS

It is important to note that, given the significant reduction in available funds in the fourth year of the YOG, contractor-funding recommendations were largely based on service priorities and then on performance. This allowed more limited resources to be targeted to the subcontractors with the best performance in providing the most necessary or 'priority' services. Staff gathered input from youth, youth development workers, community members, subcontractors and vendors regarding those service priorities.

RECOMMENDATIONS

The Executive Committee recommends that $1,178,211 of WIA Title 1D (YOG) funds be committed to the specific subcontractors as indicated in Table II for Program Year 2003-2004. In addition, the Executive Committee recommends that $510,000 be set aside for a combination of Youth-Related Expenses, Childcare and Transportation; that $373,093 be set aside for Individual Referrals; and that $575,000 be set aside for Site Service Agreements with "host" subcontractors named in the Youth Opportunity Grant, with specific funding levels to be negotiated by PIC staff. This recommendation is contingent on the continuing availability for WIA Title 1D youth funds in an amount necessary to meet current and future needs and obligations.

Attachment

TABLE II
PIC STAFF RECOMMENDATIONS
WIA TITLE 1D YOUTH OPPORTUNITY GRANT PROGRAMS
July 1, 2003 to June 30, 2004

					A		PERFORMANCE						B	C	D		E	F	
#	Proponent	Proposed Activity	Requested RFP Amount	RFP Points	PY 02/03 Award	IS/OS	Enrollment	Entered	Return to School	Staff Dev	C & C	Connection to Schools	Performance Analysis Total Score	36.28% of Prior Yr Funding X Performance Analysis Score	PY 03/04 Recommended Amount	PY 03/04 Recommended Service Level	Youth Council Ammendment to PIC Staff Recommendations	Adopted Total Recommended Amount PY 03/04	Ammended PY 03/04 Service Level
9	Mission Lang & Voc School	Basic Skills/VESL/Occupational Skills Training	$281,974	88	$200,000	OS	20	30	30	5	7.5	7.5	100	0.36285519	$72,571	20		$72,571	20
113	Young Scholars	College/SAT Prep/Leadership	$443,773	77	$50,000	IS	28		53	5	7.5	7.5	100	0.36285519	$18,143	8	$40,000	$58,143	23
43	International Institute of S F	Community Service/Leadership	$61,000	88	$35,000	IS	1	30	30	5	7.5	7.5	0		$0	0		$0	0
100	Youth Chance High School	GED Prep/Leadership	$148,647	89	$50,000	OS	2	30	30	2	5	0	69	0.36285519	$12,519	9	$40,000	$52,519	37
105	Mission Neighborhood Centers	GED Prep/Leadership	$698,412	83	$250,000	OS	20	30	30	5	7.5	7.5	100	0.36285519	$90,714	25		$90,714	25
6	The Family School	GED Prep/Leadership/Basic Skills/Parenting	$238,600	89	$238,600	OS	20	30	30	5	7.5	7.5	100	0.36285519	$86,577	23		$86,577	23
39	Young Community Developers	Internship/Subsidized Employment/JRT	$293,955	92	$220,000	IS	28	53		3	7.5	7.5	98	0.36285519	$78,232	18		$78,232	18
12	Step School-to-Career	Internship/Subsidized Employment/JRT	$500,000	90	$268,000	IS	80			5	7.5	7.5	100	0.36285519	$97,245	44		$97,245	44
82	New Ways Workers	Internship/Subsidized Employment/JRT	$314,138	88	$314,138	IS	28	53		5	7.5	7.5	100	0.36285519	$113,987	27	$40,000	$153,987	37
79	Mayor's Yth Ed & Emp Prog	Internship/Subsidized Employment/JRT	$780,097	86	$546,067	IS	28	53		5	7.5	7.5	100	0.36285519	$198,143	51	$40,000	$238,143	61
8	Horizons Unlimited of S F	Internship/Subsidized Employment/JRT	$390,343	89	$200,000	OS	20	30	30	5	7.5	7.5	100	0.36285519	$72,571	27		$72,571	27
52	Young Community Developers	Internship/Subsidized Employment/JRT	$899,200	91	$258,000	OS	20	30	30	3	7.5	7.5	98	0.36285519	$91,744	20		$91,744	20
98	Jewish Vocational Service	Internship/Subsidized Employment/JRT/(Youth w/disability)	$149,477	91	$149,477	IS/OS	20	30	30	5	7.5	7.5	100	0.36285519	$54,239	11		$54,239	11
77	Youth Treatment & Ed Court*	Life Skills/AOD Treatment/Substance Abuse Counseling	$203,000	88	$150,000	OS	0	0	0	3	7.5	7.5	0		$0	0		$0	0
60	Arriba Juntos	On-the-Job-Training (OJT) / Job Readiness Training (JRT)	$86,886	95	$86,886	OS	19	53		5	7.5	7.5	92	0.36285519	$31,527	9		$31,527	9
		TOTALS:	$5,489,502		$3,016,168									0.36285519	$1,018,211	292	$160,000	$1,178,211	355

WIA Title 1D 2003-2004 YOG Allocations

Expected Carry-over from PY3	$761,068
PY 4 Allocation	$5,250,000
TOTAL WIA TITLE 1D YOG 03/04 AWARD	$6,011,068

ANTICIPATED PY 4 OPERATING COSTS

Indirect	$415,276 - **$140,000**
Compensation & Staff Development	$2,524,892
Operations	$374,596
SUBTOTAL	**$2,899,488**

Individual Referrals/OJT Reimbursement	$233,093	***$140,000***	$373,093
Childcare	$300,000		
Youth-Related Expenses	$250,000	***($160,000)***	$510,000
Transportation	$120,000		
Site Service Agreements	$575,000	*No Change*	$575,000
Service Subcontracts	$1,018,211	*$160,000*	$1,178,211
SUBTOTAL	**$2,496,304**	*$140,000*	**$2,636,304**

*Did not meet 'good standing' criteria as established by the Youth Council

FORMULAS:
A = PY 02/03 Award
B = Total Performance Tallies
(100 = 1), (69 = .69) (98 = .98), (92 = .92)
C = $1,018,211 / $2,831,268 (36.285519%)
D = A x B x C
E = Youth Council Ammendment to re-allocate $160,000
F = D + E

6/4/03

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, September 17, 2003
Time: 9:30 a.m. – 11:30 a.m.
Location: City Hall
1 Dr. Carlton B. Goodlett Place, Room 201
San Francisco, CA 94102

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/03

Note: The Mayor has top priority for this conference room.

Please refer to the website for any last minute changes.

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, September 10, 2003

AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, SEPTEMBER 17, 2003

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the June 18, 2003 meeting *(Action Item)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentation by Lori Bamberger and Pamela Calloway (Discussion Item)*

   "WISF Board Retreat Results and Next Steps"
5. Consent Calendar *(Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

   A. Proposed Action: Ratification of Resolution to Apply for and Expend PY'03 WIA Rapid Response Funds
   B. Proposed Action: Ratification of Customized Training Eligibility for Employed Workers of Employers Seeking Customized Training Service
   C. Proposed Action: Ratification of Definitions

6. Executive Committee Recommendations *(Action Item)**
   A. Proposed Action: Ratification of Recommendations for FY 2003 County Plan Goals and Refugee Employment Social Services (RESS) and Targeted Assistance (TA) Formula Funds
   B. Proposed Action: Ratification of Design and Selection Criteria for Procurement of a Study on the Efficacy of the First Source Hiring Administration Legislation
   C. Proposed Action: Ratification of Additions to the WIA Youth Vendor List
7. Committee Reports (Information Item)
   A. Finance Subcommittee
   B. Employer Services Committee
   C. One Stop Operations and Services Committee
   D. Program Resources Committee
   E. Youth Council
8. President's Report (Discussion Item)
9. Chair's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment *(Action Item)*

*Information enclosed.

Retreat Work Products
and
Survey Results

Second Annual WISF Board Retreat

August 1, 2003

WISF Board Retreat Work Products

Executive Summary

The Workforce Investment San Francisco (WISF) 2nd Annual Board meeting was held on Friday, August 1, 2003. Dedicated to policy-making surrounding the WISF's implementation of a One Stop System, the Retreat achieved the following accomplishments:

- Successful utilization of new, basic working definitions for the terms "One Stop System", "One Stop Center", and "Access Points". These definitions comprise a common vocabulary enabling future policy decisions to be made.
- Articulation of key –mostly shared -- aspirations for the One Stop System. These aspirations may be formalized into a mission statement for the One Stop System.
- Detailed compilation of a template for determining the investment return from, or success measures by which to evaluate, various One Stop System Elements.
- A "first impression" prioritization of One Stop System Elements.
- A greater shared understanding of areas of agreement, as well as areas of disagreement, held by different WIB constituencies.

Based on the achievements accomplished during the Retreat, the following Next Steps are now positioned to occur within the next twelve months:

- Formalize acceptance of the Working Definitions
- Publish a One Stop System Mission
- Draft a One Stop System Operating Plan
- Convene of a business roundtable to explore business services to be offered by the System
- Address Board Committee jurisdiction issues
- Address One Stop Center staffing issues
- Address the "off the table" issues of: customer prioritization, funding allocation, PIC Admin Fee.

Attachments:

a. APPENDIX A: Working Definitions
b. APPENDIX B: Aspirations
    i. B1: Job-Seeker
    ii. B2: Employer
    iii. B3: WIB Board Member
c. APPENDIX C: Investment Success Measures
d. APPENDIX D: Prioritization of System Elements
    i. D1: Ranking
    ii. D2: Board Members' Interpretation and Questions re ranking
e. APPENDIX E: Keys to Success

APPENDIX A
One Stop System Working Definitions

"Workforce Development System"
The entire universe of programs, resources and activities—including those provided by public entities, businesses, labor organizations, educational institutions and community-based organizations—that seek to prepare individuals to enter and advance in the workforce.

"Economic Development Activities"
The entire universe of programs, resources and activities that seek to attract new businesses to San Francisco and the surrounding region and help existing businesses remain vital and grow.

"One Stop System"
The One Stop system represents a *subset* of workforce development and economic development programs, resources and activities that are coordinated and/or integrated for the purpose of achieving better employment and advancement outcomes for more people, more effective human resource outcomes for employers, and better linkages between the two.

"One Stop Center"
Intended to be an entry point into the System for many clients, a One Stop Center is a physical place where core services (job search and placement assistance, labor market information, initial assessment of skills and needs) are provided to job and advancement seekers on-site, and where information about and *access to* all publicly subsidized job training, education and placement services is available. A One Stop Center is also a place in which employers can list job openings, and receive assistance with employee recruitment and access to upgrade training for their incumbent workforce. All clients of the Center should be able to *access* the full range of programs, resources and activities available in the One Stop System through resources available at the One Stop Center. WIA requires that there be at least one certified, comprehensive One Stop Center in each local workforce area.

"One Stop System Access Point"
Access Points are organizations that provide all or some combination of *direct services* to One stop System customers *and* that provide access to other job training, education, employment and supportive services resources within the San Francisco One Stop System through referrals and information made readily available to all upon request.

APPENDIX B1: ASPIRATIONS OF A JOB-SEEKER

Category	Job Seeker Aspiration	Group A Total	Group B Total	Combined Total		Priority
Jobs & Leads						
	Job leads	3		3		
	Results (high paying jobs)	2		2		
	Job for me		6	6		
	Information about Jobs & job Market generally	3	5	8		
	SUBTOTAL	**8**	**11**	**19**		**1**
Resources for Job Finding & Info						
	Easy computer access	2	2	4		
	Resources	1		1		
	Orientation to center, guidance on how to use it	2	1	3		
	Open off-hours		1	1		
	Options without computer skills	1		1		
	Phone, message center		1	1		
	Transportation subsidies		1	1		
	Easy access to center		1	1		
	Resume help		1	1		
	Clothing resources			0		
	Quality/useful info	1		1		
	Access to all information	2		2		
	SUBTOTAL	**9**	**8**	**17**		**2**
Personalization of Service & Plans				0		
	Personally tailored information	2	2	4		
	Case management	1		1		
	Choices	2		2		
	Fit	2		2		
	Counselor & follow up	1		1		
	Direction down a career path	1		1		
	Help: from start to finish	1		1		
	Next steps, game plan	3		3		
	SUBTOTAL	**13**	**2**	**15**		**3**
Staff						
	Understandable guidance	1		1		
	Empathetic, supportive staff,with coaching, advocacy	3	2	5		
	Knowledgeable staff	3	1	4		
	Language	2	1	3		
	SUBTOTAL	**9**	**4**	**13**		**4**
Positive Experience						
	Smile, coffee, comfy chair, respect		7	7		
	Non-threatening interview		1	1		
	Feeling of accomplishment just by being there		1	1		
	SUBTOTAL	**0**	**9**	**9**		**5**
Connections to Work Supports						
	Connections to a support group	1		1		
	Access to work/income supports (housng, transp, childcare)	2	1	3		
	Transportation subsidies		1	1		
	Health benefits		1	1		
	SUBTOTAL	**3**	**3**	**6**		**6**
Training-Related						
	Training	1		1		
	Referrals to training	1	4	5		
	SUBTOTAL	**2**	**4**	**6**		**7**
Assessment						
	Skill assessment	3		3		
	Assessment for my needs		2	2		
	SUBTOTAL	**3**	**2**	**5**		**8**
Marketing						
	Need to know its there		1	1		
	SUBTOTAL	**0**	**1**	**1**		**9**

APPENDIX B2: EMPLOYER ASPIRATIONS

Category	Specific Aspiration	Group A Total	Group B Total	Combined Total	Priority
Easy Access					
	Online (only), website with downloadable info	1	2	3	
	Only ONE contact/portal/entry point	5	4	9	
	Speed, timeliness of response to openings, quick service	2	6	8	
	Clear directions on where to go	1		1	
	No paperwork		4	4	
	Convenient location		1	1	
	SUBTOTAL	**9**	**17**	**26**	**1**
Candidates					
	Easy access to qualified candidates with necessary skills	5		5	
	Candidates who speak english	1		1	
	Prescreened, assessed	4	8	12	
	Info on available workers generally		2	2	
	SUBTOTAL	**10**	**10**	**20**	**2**
Personalization				0	
	A package for all MY needs	2		2	
	Staff who visit MY site & understand my needs	2	1	3	
	One contact who is knowledgeable & makes site visits	4		4	
	Orientation to all benefits services available to me		2	2	
	No bull, understands my needs first	2		2	
	Knowledgeable staff	1	1	2	
	SUBTOTAL	**11**	**4**	**15**	**3**
Services for Business, Relevant Services for Job Candidates				0	
	Value-added services, something not available elsewhere	1		1	
	Customized servs: outsourced HR, job descriptions, compensation pkgs	1		1	
	Fee for service	1		1	
	Minimize risk	1		1	
	Help coordinating interviews		1	1	
	Customized training for my own employees		2	2	
	Space to do interviews		1	1	
	Basic training only (since I do my own specialized)	1		1	
	Staff who follow up with the placements	1		1	
	Work supports (housing, etc.) for my employees		1	1	
	SUBTOTAL	**6**	**5**	**11**	**4**
Information Access				0	
	Tax incentive information		3	3	
	Info on group health benefits, and reducing health costs		2	2	
	Info on business permits/public process		2	2	
	Referral to business TA		1	1	
	SUBTOTAL	**0**	**8**	**8**	**5**
Positive Experience				0	
	Don't overpromise	1		1	
	Common vocabulary	1		1	
	Trust-relationship building, ongoing	1	2	3	
	SUBTOTAL	**3**	**2**	**5**	**6**
Data				0	
	Performance data – success, track record, retention, references	1	2	3	
	SUBTOTAL	**1**	**2**	**3**	**7**

APPENDIX B3 -- WIB MEMBER ASPIRATIONS

Category	Specific WIB Member Aspirations	Group A	Group B	Combined Total	Priority
Results for Customers					
	Generate support & understanding among all users		1	1	
	Candidates have jobs at ss wages	1	6	7	
	Great customer service/quantifiable		2	2	
	Job seekers get choices		1	1	
	Repeat business (b/c effective & easy to use)		2	2	
	Successful matching of qualified candidates with jobs	2		2	
	Helps the economy		1	1	
	Satisfied customers	1		1	
	SUBTOTAL	**4**	**13**	**17**	**1**
Smooth-functioning Cogs				0	
	Effective/efficient		1	1	
	Address priorities		1	1	
	Reduced paperwork & bureaucracy		1	1	
	Generates more partner support		1	1	
	Realistic about needs		1	1	
	Clear on responsibilities/roles of all players		1	1	
	Integrated		1	1	
	Technology links all		1	1	
	No wrong door -- swipe card		1	1	
	Cooperation/alignment/linkages/common outlook	4		4	
	Clarity and simplicity	1		1	
	Focus on what's working	2		2	
	SUBTOTAL	**7**	**9**	**16**	**2**
Data				0	
	Outcomes tracked		1	1	
	Success measures, verify	5		5	
	Information on what's not working: Candor	2		2	
	Annual jobs listing & placements	1		1	
	SUBTOTAL	**8**	**1**	**9**	**3**
Centers that are Vibrant				0	
	Provide minimally required OS services		1	1	
	Centers meet employer and jobseeker needs		1	1	
	Accessible		1	1	
	Adeqaultely funded		1	1	
	Enthusiasm in customer service	1		1	
	Busy, humming, vibrant	2		2	
	Knowledgeable staff	1		1	
	SUBTOTAL	**4**	**4**	**8**	**4**
Marketing				0	
	First place to think of if job-hunting, candidate-seeking, layoffs,		3	3	
	System is recognizable to all -- benefits, access, location		1	1	
	Sharp story	1		1	
	Remember most biz is < 20 employees	1		1	
	SUBTOTAL	**2**	**4**	**6**	**5**
Culture of Excellence				0	
	Culture of quality/excellence, "sets the standard"		1	1	
	Improves peoples lives, increased self-worth		2	2	
	Integrity of system		1	1	
	Excellent experience	1		1	
	SUBTOTAL	**1**	**4**	**5**	**6**
Universal Access				0	
	Blurred eligibility -- can serve all	1	2	3	
	Services complement each other (jobs/seekers)		1	1	
	SUBTOTAL	**1**	**3**	**4**	**7**
New Resources to the Table				0	
	More resources/programs		1	1	
	New resources to table		1	1	
	Safety net services available		1	1	
	SUBTOTAL	**0**	**3**	**3**	**8**

APPENDIX C

One Stop System Investment Success Measures:

Criteria for determining the worth of investments in One Stop System Elements
"This would be worthwhile to_____(stakeholder)_____ IF it ____________"

lement	Job- or Advancement Seeker	Business	Service Provider	Concerns	Crit Votes	Crit+ N2H Votes
hared ntake & ustome racking Swipe ard)	- Simplifies entry/enrollment for the jobseeker – one time only - Information is available in multiple languages - Results in increased integration throughout the system - Enhances speed, efficiency - Helps in targeting referrals	- Helps in better targeting referrals - Helps track placements - Reduces (irrelevant) information provided to me	- Results in decreased paperwork burden & PIC reporting for me - Results in increased integration throughout the system - Helps track placements - Increases capacity of CBOs to tailor services (by knowing where the job seeker has been) - Is available on screen (to the intake officer) in multiple languages - Tracks services/use of services throughout the system - Increases capacity of CBOs to bring in new technology generally	- Privacy – legal and personal issues (but possibility of aggregating anonymous information) - Who has a right to the information? - Manipulability of information – Quality control issues/accuracy - Damage to job-seeker from inaccurate information and difficulty in repairing information - Missed opportunity for relationship building at different intake points	17[6]	27[7]
hared ssess-nent ools/Processes	- Eliminates duplication - Results in time savings	- Is reliable, acceptable, & relevant to business needs - Is Standardized & recognized - Is administered by staff (where provided) that is trained & qualified to administer	- Results in time and cost savings - Eliminates duplication for CBO - Is administered by staff (where provided) that is trained & qualified to administer - Is standardized & recognized	- Privacy - Diversity in job-seekers requires diversity in assessment tools - Service providers still need to assess employability – will there really be time savings? - Legal & Moral issues surrounding what can & should be shared with employer - Tension between employers' interest in pre-screening & government's interest in increasing accessibility of candidate to job	4	13
arket-ng	- Tells the job-seeker where to go and what to expect - Increases customer choice & options	- Targets the right job-seekers - Effectively sends the message that business can get	- Fills Service Provider programs - Increases the # of businesses that hire from the System - Enhances reputation of the	- Timing: Once marketing is commenced, the System must be ready to deliver results - Effort must be sustained over time –	20	25

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[6] This column reflects the total number of participants who considered the Element to be Critical right now.

[7] This column reflects the sum total of participants who considered the Element to be either Critical or Nice to Have right now.

Element	Job- or Advancement Seeker	Business	Service Provider	Concerns	Crit Votes	Crit+ N2H Votes
	• Increases the job-seeker's understanding of what's available and value-added • Increases the # of businesses that hire from the system • Increases Job-seekers' understanding of those services that have a high ROI • Truly explains how to access benefits • Segments benefits to different types of job-seekers • Enhances reputation of system (thereby increasing likelihood of employment from it)	quality candidates from the System • Truly explains how to access • Increases understanding of what's available & value-added • Increases understanding of services with high ROI • Explains reputational benefits that could result from corporate citizenship through participation in the system	system and its participants • Effectively sends the message that business can get quality candidates from the System • Increases CBO exposure • Links CBOs to other parts of the System • Brand recognition results from placements	you can't market once and expect results to continue without additional and ongoing investment in marketing and in the System • Efforts must be complementary to service provider marketing efforts • Marketing should be able to also increase System's ability to raise funds outside of publicly appropriated dollars		
Directory of Information Enabling Referrals	• Increases choice & options • Results in consistent service • Is easy to use, and both online & off-line • Increases job matches with qualified candidates • Is constantly updated • Contains forms that are accessible and in multiple languages • Contains databases that are searchable and segmented in accordance with job-seeker interest & abilities • Includes feedback (performance & satisfaction data) from jobseekers and employers	• Provides information to my existing employees about training & service options • Increases job matches with qualified candidates • Is updated constantly • Contains job-listing databases that are searchable only by qualified job-seeker • Includes feedback (performance & satisfaction data) from job-seekers & employers	• Increases job matches with qualified candidates • Increases referrals to CBOs • Is constantly updated • Helps CBOs make better referrals • Is easy to use by CBO, both online & off • Requires only minimal/reasonable CBO burdens to maintain • Increases choice & options for job-seeker • Contains forms that are accessible and in multiple languages • Contains databases are searchable and segmented in accordance with job-seeker abilities	• Information must be current & constantly updated • Need to do it right or not at all! • Maintenance costs must be reasonable • Challenge of being language-inclusive • Content can't be too narrow • Should result in consistent treatment among all job-seeking clients (vis-à-vis cross referrals) – may involve training Center and CBO staff • Credit will need to be shared among Center and Access Point efforts	10	21
One Stop Center	• Is convenient & efficient • Results in appropriate referrals • Provides a single contact for the job-seeker – who provides access to all	• Is convenient & efficient. • Appropriately targets candidates for my available jobs • Provides a SINGLE contact for a business	• Results in appropriate referrals • Provides quality guidance and referrals • Employs cross-trained staff allowing them to maximize availability of options & referrals to	• Uniformity of guidance, service access • Cross-training of staff is essential • Cross-referrals need to occur and be accurate	23	27

Element	Job- or Advancement Seeker	Business	Service Provider	Concerns	Crit Votes	Crit+ N2H Votes
	• Offers quality guidance & customized assistance • Employs cross-trained staff -- ensuring that all relevant options will be provided to job-seeker • Results in job placement outcomes • Satisfies customers • Meets needs of self-directed job-seeker • Refers those who need more intensive services to appropriate providers	• Provides customized assistance • Results in job-placement and retention outcomes • Satisfies customers	job-seeker • Results in job-placement outcomes • Satisfies customers • Smoothly coordinates actions between & among Center staff and CBO case management staff (at Access Points) • Meets needs of self-directed job-seeker • Refers those who need more intensive services to appropriate providers			
Business Services	• Results in more jobs – real jobs • Results in more accountability – that job-seekers in system will actually get jobs • Provides customized training for real jobs • Results in the gathering of better Trend Labor Market Information	• Reduces transaction costs arising from hiring and retaining job-seekers • Is non-duplicative of what the employer already possesses (and prefers) in-house • Assists in informing businesses about possible tax credits from hiring job-seekers out of the System • Provides information about availability of customized training • Results in cost-savings to employer without quality decreases • Results in more accountability – that the system will be tailored to ensuring that businesses will hire out of this job-pool for real jobs • Provides Trend Labor Market info useful by businesses	• Provides information about availability of customized training from CBOs • Results in more jobs for service-providers' clients • Results in more accountability – that job-seekers in system will actually get jobs • Is non-duplicative of what is already provided to businesses from CBOs • Results in cost-savings to service-provider without quality decreases • Results in the gathering of better Trend Labor Market Information	• Savings should be reinvested in the system • Quality must stay high to remain attractive to business	11	20

APPENDIX D1

Investment Return Ranking

Element	Critical	Nice to Have	Not Now	Grave Concerns
Shared Intake/Customer Tracking/Swipe Card System	17	10	1	2
Shared Assessment Tools/Processes	4	9	8	2
Marketing	20	5	2	0
Directory of Information enabling Referrals	10	11	2	0
One Stop Center	23	4	2	0
Business Services	11	9	6	0

APPENDIX D2

Plenary Discussion Regarding Interpretation of Ranking of System Elements

Questions Raised:

Consistency with pre-existing priorities:

- Are these results consistent with the Workforce Investment San Francisco prioritization of services to job-seekers who are low-income, with multiple barriers?
- Where is training on this vote?
- Where is quality?
- This triggers questions of Board governance of the One stop Centers and System: what's properly in the jurisdiction of the One stop Committee? Facility operation? Satellite operations?

Triggering new thinking:

- How do we link our goals and priorities (discussed in the morning session) with our spending priorities? How do we operationalize this? Through committees?
- What is the mission of the WIB? You can't prioritize spending without understanding the mission.
- Is the Center currently missing a link – to intensive services for individuals who are low-income, with multiple barriers? Would these be better incorporated in the Center, or for referral to CBOs?
- Business Services – perhaps there is other engagement by businesses that should be prioritized above what we've been traditionally discussing?

Next Steps/Takeaways:

Putting the vote in its place:

- The list of elements is not comprehensive – therefore the vote cannot be conclusive
- Chart is a tool, not an answer
- It seems that One stop Centers serve a greater volume and wider variety of clients than the training portion of the WIB
- We can do both: One stop System/Economic Development System AND prioritization of training services for individuals who are low-income and with multiple barriers

The vote leads us to additional urgent work:

- We need to take on the customer prioritization issue
- We need feedback on the contentious spending items
- We can't market until we make it
- We should test the Board retreat work at a later date
- Clarify role of the One Stop Committee
- Mini-retreat another day?

APPENDIX E

The key to the System's Success

It is 2004, and San Francisco has just been recognized for its implementation of the most successful One Stop System in the Nation. You're accepting the award on behalf of the City. As you give your acceptance speech, you say that the key to the System's success was...

We maximized Customer Choice

- We understood customer needs
- There are no wrong doors
- We understand that "handicapped people" is not the same as a handicap resulting from the absence of services

We operated a cooperative, aligned, & creative WIB

- Cooperation
- We stepped outside the box
- The WIB Board provided excellent leadership
- We listen to each other
- We stay focused on the community
- We collaborate
- We have a mission, vision, and strategic plan, and we followed through
- We brought communities together
- We share information and resources
- We created a true partnership where everyone understood their roles and responsibilities
- We eliminated turf
- We're willing to be creative

We invested wisely & strategically

- We use money wisely
- We invest strategically
- We allocated scarce resources wisely and with integrity
- We waste not, want not
- We developed a fee-for-service program

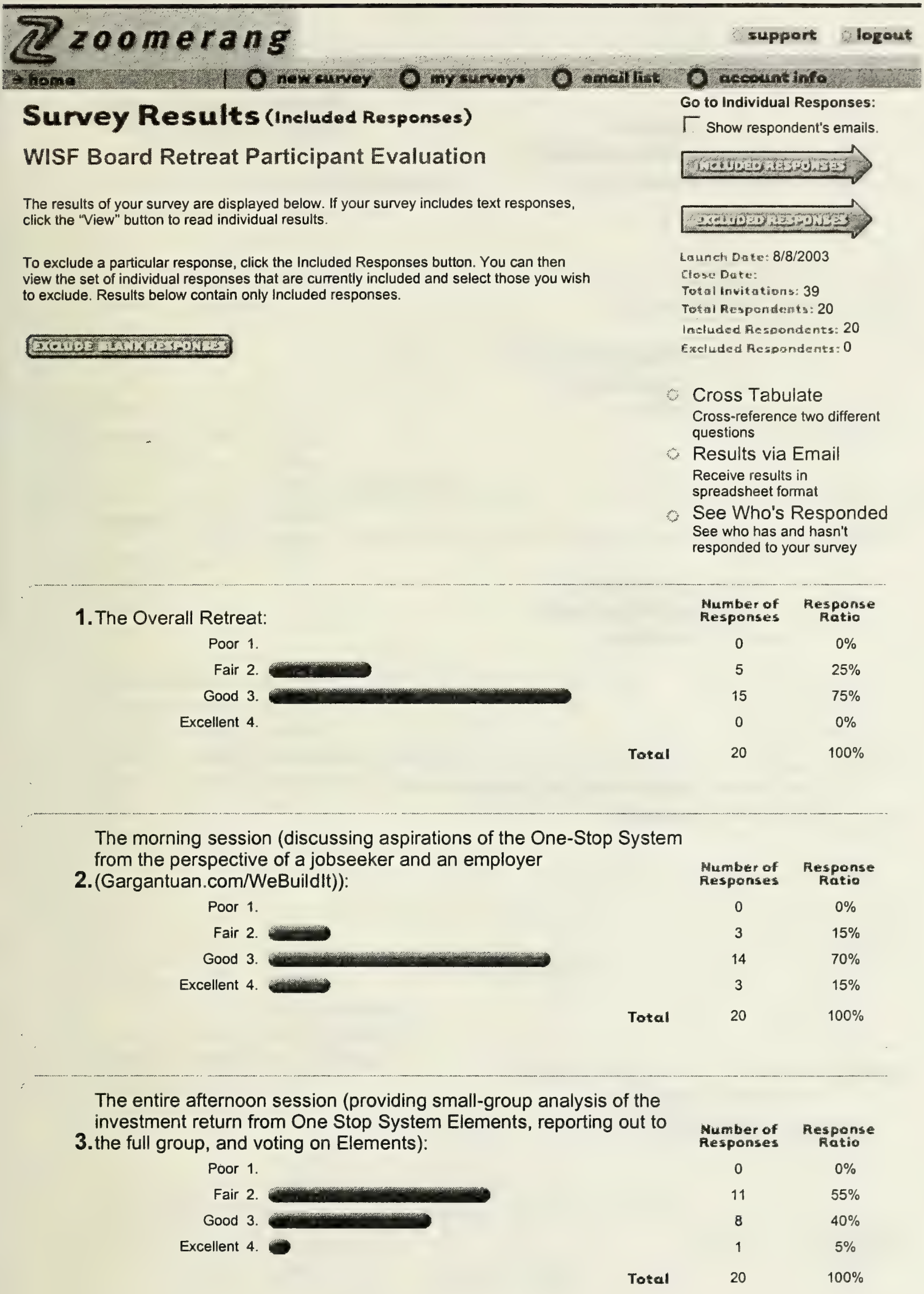
We created and measured outcomes

- We measured important outcomes
- We invested in customers with top quality services and achieved results
- We created 6,000 new jobs

We engaged business

- We successfully engaged the business community
- We met employers' needs
- San Francisco is THE place for a trained workforce

WISF Board Retreat
Zoomerang Survey Results



Survey Results (Included Responses)

WISF Board Retreat Participant Evaluation

The results of your survey are displayed below. If your survey includes text responses, click the "View" button to read individual results.

To exclude a particular response, click the Included Responses button. You can then view the set of individual responses that are currently included and select those you wish to exclude. Results below contain only Included responses.

Go to Individual Responses:

☐ Show respondent's emails.

Launch Date: 8/8/2003
Close Date:
Total Invitations: 39
Total Respondents: 20
Included Respondents: 20
Excluded Respondents: 0

○ Cross Tabulate
Cross-reference two different questions

○ Results via Email
Receive results in spreadsheet format

○ See Who's Responded
See who has and hasn't responded to your survey

1. The Overall Retreat:

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	5	25%
Good 3.	15	75%
Excellent 4.	0	0%
Total	20	100%

2. The morning session (discussing aspirations of the One-Stop System from the perspective of a jobseeker and an employer (Gargantuan.com/WeBuildIt)):

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	3	15%
Good 3.	14	70%
Excellent 4.	3	15%
Total	20	100%

3. The entire afternoon session (providing small-group analysis of the investment return from One Stop System Elements, reporting out to the full group, and voting on Elements):

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	11	55%
Good 3.	8	40%
Excellent 4.	1	5%
Total	20	100%

4. Facilitating by Amanda Feinstein:

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	5	25%
Good 3.	9	45%
Excellent 4.	6	30%
Total	20	100%

5. Facilitating by Lori Bamberger:

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	9	45%
Good 3.	7	35%
Excellent 4.	4	20%
Total	20	100%

6. Facilitating by the team of Amanda Feinstein & Lori Bamberger:

	Number of Responses	Response Ratio
Poor 1.	0	0%
Fair 2.	7	35%
Good 3.	8	40%
Excellent 4.	5	25%
Total	20	100%

7. Which session did you find most valuable?

	Number of Responses	Response Ratio
Morning Session	15	75%
Afternoon Session	5	25%
Total	20	100%

8. Why?

20 Responses

9. Which session did you find least valuable?

	Number of Responses	Response Ratio
Morning Session	5	25%
Afternoon Session	15	75%
Total	20	100%

10. Why?

20 Responses

11. Which size session did you prefer?

	Number of Responses	Response Ratio
very small – 4-6 individuals	4	20%
medium (half group)	4	20%
full-group sessions	3	15%
a mix	9	45%
Total	20	100%

12. Why?

20 Responses

13. I found the retreat valuable.

	Number of Responses	Response Ratio
Strongly agree 1.	2	10%
Agree 2.	13	65%
Neutral 3.	3	15%
Disagree 4.	2	10%
Strongly disagree 5.	0	0%
Total	20	100%

14. I have a better understanding of the positions and interests of my colleagues on the WIB Board.

	Number of Responses	Response Ratio
Strongly agree 1.	3	15%
Agree 2.	11	55%
Neutral 3.	5	25%
Disagree 4.	1	5%
Strongly disagree 5.	0	0%
Total	20	100%

15. There was enough time to network with my peers on the Board.

	Number of Responses	Response Ratio
Strongly agree 1.	0	0%
Agree 2.	7	35%
Neutral 3.	7	35%
Disagree 4.	6	30%
Strongly disagree 5.	0	0%
Total	20	100%

16. I am comfortable with using the basic "skeletal" definitions of One Stop System, One Stop Center, and Access Points that were presented and used during the day.

	Number of Responses	Response Ratio
Strongly agree 1.	3	15%

Agree 2.	13	65%
Neutral 3.	3	15%
Disagree 4.	1	5%
Strongly disagree 5.	0	0%
Total	20	100%

---

17. I think the Board members share common aspirations for the One Stop System.

	Number of Responses	**Response Ratio**
Strongly agree 1.	1	5%
Agree 2.	8	40%
Neutral 3.	5	25%
Disagree 4.	4	20%
Strongly disagree 5.	2	10%
Total	20	100%

---

18. I would have preferred to spend the afternoon building on the aspirations we articulated in the morning, such as by figuing out what actions we should take to get to those aspirations.

	Number of Responses	**Response Ratio**
Strongly agree 1.	7	35%
Agree 2.	11	55%
Neutral 3.	1	5%
Disagree 4.	1	5%
Strongly disagree 5.	0	0%
Total	20	100%

---

19. I would be willing to spend another day or part of a day to continue the work we set forth in the morning -- figuring out how we arrive at the mutual aspirations for the one-stop system.

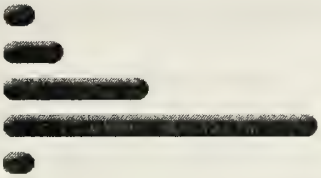
	Number of Responses	**Response Ratio**
Strongly agree 1.	3	15%
Agree 2.	13	65%
Neutral 3.	2	10%
Disagree 4.	2	10%
Strongly disgree 5.	0	0%
Total	20	100%

---

20. I would be willing to use the grid of One Stop System Elements investment value as performance or success measures by which to evaluate San Francisco's implementation of a One Stop System.

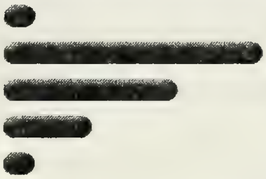
	Number of Responses	**Response Ratio**
Strongly agree 1.	0	0%
Agree 2.	8	40%
Neutral 3.	6	30%
Disagree 4.	4	20%
Strongly disagree 5.	2	10%
Total	20	100%

21. The vote taken at the end of the day on spending priorities reflected the work of the full day.



	Number of Responses	Response Ratio
Strongly agree 1.	1	5%
Agree 2.	2	10%
Neutral 3.	5	25%
Disagree 4.	11	55%
Strongly disagree 5.	1	5%
Total	20	100%

22. The vote taken at the end of the day on spending priorities seemed arbitrary, and unconnected from the work of the full day.

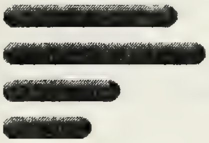


	Number of Responses	Response Ratio
Strongly agree 1.	1	5%
Agree 2.	9	45%
Neutral 3.	6	30%
Disagree 4.	3	15%
Strongly disagree 5.	1	5%
Total	20	100%

23. If I understood that we were voting to spend our allocation from among non-training dollars, I would have voted differently.

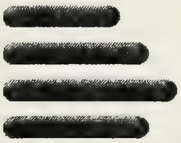
	Number of Responses	Response Ratio
Strongly agree 1.	2	10%
Agree 2.	2	10%
Neutral 3.	9	45%
Disagree 4.	5	25%
Strongly disagree 5.	2	10%
Total	20	100%

24. I think it was important to spend a full day on the One-Stop System.



	Number of Responses	Response Ratio
Strongly agree 1.	6	30%
Agree 2.	7	35%
Neutral 3.	4	20%
Disagree 4.	3	15%
Strongly Disagree 5.	0	0%
Total	20	100%

25. I would have preferred to spend the Board Retreat doing something else.



	Number of Responses	Response Ratio
Strongly agree 1.	0	0%
Agree 2.	4	20%
Neutral 3.	5	25%
Disagree 4.	6	30%
Strongly agree 5.	5	25%
Total	20	100%

26. For those who agreed to #13, your preference would have been:

VIEW 20 Responses

27. Other comments

VIEW 20 Responses

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Survey Results (Included Responses)

WISF Board Retreat Participant Evaluation

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Each individual respondent is referenced under the # column.

8 Why?

#	Response
1	The morning session got us started as to what we are trying to accomplish, what we have accomplished, what are our resources, what is needed, etc.
2	The morning seemed much more productive -- the end of day we seemed to be at a stand-still.
3	Placing the customer's needs first.
4	We were able to have part of the conversation on the outlines of a one stop system and one stop center.
5	Helped us articulate and share our vision for the one stop center from the perspective of specific customers
6	It helped to identify what the needs of the System are, from the perspective of different "customers" - I only wish it was more integrated, both in looking at the mutually beneficial elements across customers and then in tying it into System prioritizatin in the afternoon session.
7	It was the priorities that were at issue. I would have liked to discuss these in more detail w/ the participants.
8	because I pay better attention and get more involved in the mornings in general
9	Good discussions among board members, which helped us know each other and our interests and ideas better. On the other hand, I thought the discussion on the one stop system vs. center took far too long and could have been addressed by a simple description of terms.
10	Opportunity for thoughtful discussion. This information should have been used in the afternoon.
11	The group was able to identify a vision that should operate within the system. I also thought clarifying the terms was good for many of the attendees.
12	more open discussion
13	Both sessions helped get us closer to the issues and work ahead. That's why I rated the overall retreat good. These discussions are part of the evolution of where we need to go. It's disturbing that there are still so many questions and issues, including identity and mission, etc, but it's important information to know to go forward and resolve.
14	Very productive group discussions
15	Group feedback and stated actions to be taken were more meaningful.
16	Understanding what the customer wants
17	It allowed the Board to finally begin to get at the "real" issues i.e., contracted services vs vendors, hard to service populations, what the role of the one-stop committee really is and isn't. Unfortunately, most of these "real" issues weren't the focus of the retreat.
18	clarification of terms
19	Good understaning and discussion of One Stop
20	Because everyone voted for the importance of marketing...then those that didn't agree voiced their opinion and the minority "won" because the Chair agreed with the minority????? Why did I spend my time attending????

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Survey Results (Included Responses)

Report Overview

WISF Board Retreat Participant Evaluation

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10 Why?

#	Response
1	Even though I enjoyed the afternoon session, I was hoping that more decisions would have been made by the group as to how we can enhance Board members ownership of the Board meetings, committee meetings, work more cohesively, bring more employers to SF., etc. I feel that some decisions need to be made by the Exec. Committee and some by the Committee and then recommended to the Exec. Committee and then some need Board approval and it does not appear that we are clear about the process, etc. However, it was great to get together with everyone and learn more about each other and this year I was able to become more acquianted with 2 more Board members.
2	Again – it's felt like we were at a stand-still.
3	We failed to tie it together at the end. We were left with a feeling that consensus wasn't reached.
4	While some of the sharing is good (it always is) I don't think the design of it led us to meaningful insights or conclusions. It seems that these retreats should help us see things in a new way or reorder our sense of what we already feel we understand. This didn't happen I don't feel in the afternoon. t sodon t nt e
5	The elements we discussed and put in priority order may not have been the right ones. We also should have addressed the issues which were "off the table" as these guide any discussion of priorities
6	It was disjointed from the morning session and tended to polarize people back into thinking only of their own sector.
7	Much of this was redundant. We have discussed in great detail for several years.
8	I tend to lose focus
9	There needed to be more discussion before we voted at the end of this session on the priorities for the One Stop Center. The context wasn't clear enough. Were we voting on this to prioritize funding? To prioritize activities at the One Stop or what? Also the big elephant on the table throughout the day seemed to be the allocation of funds for different purposes. When do you want the board to deal with this?
10	Too quick. No tie in to morning session.
11	I thought there was a disconnect between the morning session where the vision was pretty well defined and the afternoon session. I thought that the afternoon session should have discussed who would assume responsibility for implementing the vision laid out in the morning.
12	too staff driven
13	Both sessions helped get us closer to the issues and work ahead. That's why I rated the overall retreat good. These discussions are part of the evolution of where we need to go. It's disturbing that there are still so many questions and issues, including identity and mission, etc, but it's important information to know to go forward and resolve.
14	Some of the smaller breakout groups were not sufficiently focused.
15	System or Center.....Far to much time spent on definition as well as many Board Memebers had not done their homework on One Stop. Also thought our One Stop Committee Chair was somewhat frustrated in lack of action. This is the major area where our facilitators could have improved.
16	no particular reason other than the survey requires you answer the question
17	Unfortunately we couldn't come to consensus about the definition of one-stop system, one stop center or satelites and we should not have proceeded on until everyone was on the same page. And, everyone should have been privy to the keynote speaker from the previous evening.
18	seemed we were not answering the most pressing questions
19	to many open issues
20	For me personally the value was in realizing the gaps in knowledge about the one-stop by the group as a whole. I don't think either session really answered the question of whether the WIB wants to invest in a dynamic, functional one=stop or to just have one in name only. The territorial imperatives and influence of those with money tied to decision making seems to make it impossible to move ahead as a WIB.

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Survey Results (Included Responses)

REPORT OVERVIEW

WISF Board Retreat Participant Evaluation

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12 Why?

#	Response
1	I guess I like a variety of situations - one gets to interact with a lot more individuals and this is good.
2	Mix always proves best – more information is covered with a variety of session layouts.
3	I got to listen and understand other persepectives.
4	All the sizes have there place, a mix is useful to pull out different types of information etc. The problem in most workshops is the small group and then endless report back, without much back and forth, hard design problem.
5	No strong opinion; actually I thought all formats worked well
6	I like mixing it up - branistorming with small groups and then synthesizing with the full group - because it gives the group a chance to focus and then to expand and find commonalities amongst the group.
7	The entire group should be up to speed on the issues and able to hold a facilitated discussion on same.
8	better focus
9	For this size group I prefer half and whole group discussions. If the groups are too small then we may not hear enough perspectives to get the best understanding of the issues and ideas for the possible solutions. Reporting back to the larger group with many small groups doesn't solve this because what get's reported back is typically a nutshell summary and it takes time for the report-backs of many groups that is not very engaging.
10	Provides an oppotunity for a variety of feedback
11	Thought there was a diversity of opinion and recommendations but was not too large so everyone got to contribute.
12	manageable
13	Small groups allow for more quality discussion. However, it's important to get a consolidated final result.
14	Good exchange of information by using a mixure of group sizes. Given large size of the Board, we need to break it up, but we also need to make sure that the entire board gets to hear the most important points.
15	We concluded with broader perspective. Smaller groups could be made up of the same grouping of individuals, e.g. CBO"s etc.
16	I like to hear everyone's perspective
17	More opportunity to flesh out ideas in smaller groups as well as provides an opportunity to hear from other less vocal folks, however, feedback from the full group is good to way to vet and obtain consensus from the greater body
18	got to meet and interact with individuals more than usual, but also got to interact with group as a whole
19	Better discussion
20	The dynamics of a small group interacting allow for candid comments not often expressed in a larger group.

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26 For those who agreed to #13, your preference would have been:

#	Response
1	I feel annual retreats are important and valuable.
2	I'm not sure how this question relates to question #13...
3	I am not sure of this.
4	We did make progress and its great to have everyone sharing their views and seeing how close or far we may be from consensus.
5	Yes, the retreat was valuable to move us toward a common understanding of terms and a common vision for the one stop. The afternoon would have been more productive had we focused on the customer and service priority issues that were "off the table" and then compared these with our vision
6	I agree that it was important to spend the day focusing on the One-Stop System, I simply wish that we could have tackled some of the "meatier" issues, such as how and why funds are prioritized and how to work together more across sectors (CB), private / employers and pucblic /PIC).
7	I think that much of what took place was a rehashing of issues.
8	? I found it valuable
9	Don't you mean for those who disagreed with #13 about the value of the retreat?
10	It is important for the WIB members and committee members to have time to step away from the day-to-day responsibilities and to focus on crosscutting issues.
11	I don't understand this question. I agreed the day was valuable so I wouldn't prefer something else.
12	disagreed
13	I agree the retreat was valuable, if only to identify the work still to be done and the issues.
14	Huh? I think the numbering system may be off.
15	I found the retreat valuable. Preference??
16	I don't understand the question. If agreed, then I have no other preference.
17	The retreat was valuable because now you know how truly complexed and convoluted the situation really is requiring much more concentrated attention than has been given in the past with clear definititions and inclusion for all.
18	this questin doesn't make sense to me
19	No comment
20	didn't agree with 13

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Survey Results (Included Responses)

REPORT OVERVIEW

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Questions that required written responses are displayed by individual query. The "Report Overview" button or "Back" button will return you to your survey results.

Each individual respondent is referenced under the # column.

27 Other comments

#	Response
1	I continue to feel honored to be a member of the SF Workforce Investment Board and will contine to make all the contributions that I can.
2	I enjoyed spending the time with other WIB members.
3	Consensus building takes time and patience. This was a good step and I thought some issues were surfaced that needed to be discussed.,
4	I think we need to have a short, almost elevator version of what the workforce development system should be doing in SF and an idea of where we are heading. We do have a de facto one now, it would be good to articulate that and see how much buy in we have and then make plans to move in that direction. Too mushy right now, or at least unspoken.
5	Thanks to the staff for setting up and running the retreat so smoothly!
6	I feel that the retreat scratched the surface, which definitely needed to be done, but there is much work ahead. There is still a lot of tension between those who want to focus on the One Stop CENTERS and viewing the One Stop SYSTEM as a whole, that includes Access Points and training for those with the most needs / barriers to employment.
7	I would have preferred to discuss the issues and concerns head on. I don't think there was a need to redefine issues to the group.
8	none
9	Overall, I thought the retreat was fine. As a newcomer to the board it gave me an opportunity to talk more informally with other members and get to know their issues and interests. I also thought the speaker at the pre-retreat dinner was excellent and helped set the stage for the importance of this work. Many thanks to the facilitators and the PIC for organizing this.
10	none
11	Overall, a worthwhile day. I hope there is a greater common understanding of the lingo associated with our work. There needs to be followup on discussing who is responsible for implementing the various components of the vision. Once that is completed, the difficult discussion of how this is funded needs to take place. There may also be a need to re-define who the population to be served is.
12	none
13	If more time is to be devoted to One Stop (system and place) or other issues identified by the retreat, I will only be able to participate after the month of October.
14	Great job. Thanks for pulling all this together.
15	I was looking for the retreat to be more encompassing of all committees, possibly in support of the One Stop and how they interact.
16	none
17	A common trust must be established amoung all stakeholders!
18	none
19	Overall it was worthwhile. It needs to be continued
20	If the direction of the WIB is to have a fully functional one=stop that has a positive impact on the whole SF community then my time has not been wasted. If we want a one-stop that only fits the bare requirements, I would not have invested so many hours on the project. It is sad to see special interests interferring with a federal mandate, but if the WIB chooses to invest all its resources in one area then the time and energy spent on another area is wasted. I think the one-stop committee is frustrated because what we originally thought was our mission on the board is really just for show and the number of hours we feel we have wasted could be better spent elsewhere.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

A RESOLUTION TO AUTHORIZE THE PRIVATE INDUSTRY COUNCIL OF SAN FRANCISCO, INC. TO APPLY FOR AND EXPEND PY'03 WORKFORCE INVESTMENT ACT RAPID RESPONSE FUNDS (DISLOCATED WORKER SERVICES)

9 July 2003

RECITALS

The Employment Development Department of the State of California has invited applications for the delivery of Rapid Response services to laid off workers. Applications may take the form of "Baseline Rapid Response Applications" or "Special Rapid Response Project Applications."

> "Local WIA administrative entities must submit Baseline RR Applications if they plan to provide any RR services. At a minimum, the State expects the LWIAs to use these funds to defray all the costs of providing RR orientations to workers who have been laid off, during PY 2003-04, due to business closures and/or major layoffs in the LWIA.
>
> "Local WIA administrative entities and other organizations may submit Special RR Project Applications. In LWIAs where Baseline RR funds do not suffice to cover all the costs of conducting required RR activities, the administrative entity may also request Special RR Project funds to defray additional costs of such activities. Special RR Project Applications will be reviewed competitively to determine whether they will be funded and at what level."

Baseline Applications are due in Sacramento by July 30, 2003; Special (competitive) applications will be accepted until the State's funds are exhausted.

> The Private Industry Council of San Francisco, Inc. (PIC) has experience in providing pre-layoff assistance to employers, labor organizations and affected employees, including group orientations, group assessments, and referrals to a variety of services needed by dislocated workers. In addition, it has a demonstrated track record in providing post-layoff assistance to affected employees, including referral to core, intensive and training services.

NOW, THEREFORE, this Executive Committee being duly constituted and acting as the duly appointed Board of Directors of the PIC hereby **RESOLVES**

> That the President of PIC, at her discretion, is authorized to apply for, accept, and expend Workforce Investment Act Rapid Response funds effective July 1, 2003 and for the balance of the program year, for such Rapid Response activities as may be needed by workers laid off in San Francisco. This authorization includes joining with neighboring counties and jurisdictions for regional competitive applications, if appropriate.

THE FOREGOING RESOLUTION WAS DULY PASSED AND ADOPTED ON JULY 9, 2003 BY THE BOARD OF DIRECTORS.

Lynn B Bunim

Lynn Bunim, Chairperson
Workforce Investment San Francisco Board

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
telephone 415.431.8700 • Fax 415.431.8702
TDD 800.735.2929 (CRS)

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** JULY 9, 2003

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATION FOR WIA TITLE I ADULT FUNDED CUSTOMIZED TRAINING ELIGIBILITY FOR EMPLOYED WORKERS OF EMPLOYERS SEEKING CUSTOMIZED TRAINING SERVICE (Agenda Item 5B)

The WISF Board is asked to ratify the July 9th action of the Executive Committee to approve $13.78 per hour as the income eligibility criteria for the Customized Training Program.

BACKGROUND

On April 11, 2003, the Executive Committee of the Workforce Investment San Francisco (WISF) Board adopted the policy framework of a Customized Training Program (CTP) recommended by the Employer Services Committee. The CTP is designed to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party training provider, who meets the requirements set out by the Private Industry Council of San Francisco, Inc. The program is intended to help employers to meet their needs for a skilled workforce while simultaneously providing opportunities for trainees to move towards self-sufficiency. CTP may be provided for both unemployed persons seeking employment or employed individuals hoping to improve their job skills and advance toward self-sufficiency.

On April 30, 2003, the WISF Board adopted the Self Sufficiency Standard (SSS) for San Francisco developed and calculated by Wider Opportunities for Women, based on family size as the eligibility criteria for WIA Adult funds for intensive and training services. At the same meeting, the WISF also adopted the recommendation that 10% of the 2003 WIA adult funds available for job-seeker directed intensive and training services be set aside for serving adults whose incomes are between the low-income level as defined by WIA and 75% of the San Francisco SSS.

The SSS was developed based on family size. Given the difficulties anticipated in obtaining family size documentation from employers, and to facilitate the rapid turnaround concept, the Employer Services Committee recommends that, for purposes of CTP, the income eligibility criteria for employed workers of employers seeking customized training service be determined on individual hourly wage only. On June 25, 2003, the Employer Services Committee adopted a wage per hour of $13.78 or its monthly equivalent, $2388.93, as SSS derived from a typical family size.

RECOMMENDATION

In an attempt to calculate an appropriate hourly wage ceiling, staff used the average family size of all WIA adult participants from PY 2001- 2002 (July 1, 2001 through June 30, 2002). The typical family size for this group of participants was 1.6, or one adult and one child. While WIA eligibility determination does not require information on dependent's age, staff also recommend that 75% of the SSS for a family size of one adult and one school age child wage be used. The 75% SSS for this family size is $13.78 per hour, assuming a 40-hour workweek, or a monthly equivalent of $2,388.93.

Staff will be available at your meeting to answer any questions you may have. If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

WORKING DEFINITIONS AND CONCEPTS

"Workforce Development System"
The entire universe of programs, resources and activities — including those provided by public entities, businesses, labor organizations, educational institutions and community-based organizations — that seek to prepare individuals to enter and advance in the workforce.

"Economic Development Activities"
The entire universe of programs, resources and activities that seek to attract new businesses to San Francisco and the surrounding region and help existing businesses remain vital and grow.

"One Stop System"
The One Stop system represents a *subset* of workforce development and economic development programs, resources and activities that are coordinated and/or integrated for the purpose of achieving better employment and advancement outcomes for more people, more effective human resource outcomes for employers, and better linkages between the two.

"One Stop Center"
Intended to be an entry point into the System for many clients, a One Stop Center is a physical place where core services (job search and placement assistance, labor market information, initial assessment of skills and needs) are provided to job and advancement seekers on-site, and where information about and *access to* all publicly subsidized job training, education and placement services is available. A One Stop Center is also a place in which employers can list job openings, and receive assistance with employee recruitment and access to upgrade training for their incumbent workforce. All clients of the Center should be able to *access* the full range of programs, resources and activities available in the One Stop System through resources available at the One Stop Center. WIA requires that there be at least one certified, comprehensive One Stop Center in each local workforce area.

"One Stop System Access Point"
Access Points are organizations that provide all or some combination of *direct services* to One-Stop System customers *and* that provide access to other job training, education, employment and supportive services resources within the San Francisco One Stop System through referrals and information made readily available to all upon request.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** AUGUST 28 , 2003

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATIONS FOR FY 2003 COUNTY PLAN GOALS AND REFUGEE EMPLOYMENT SOCIAL SERVICES (RESS) AND TARGETED ASSISTANCE (TA) FORMULA FUNDS (AGENDA ITEM 6A)

The WISF Board is asked to ratify the August 28th action of the Executive Committee to approve County Plan goals and an expenditure plan for Federal Year (FY) 2003 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) formula funds.

COUNTY PLAN DESIGN AND GOALS

Design

PIC Staff recommends no substantial changes to the refugee program design or County Plan, which include all of the services and activities we are currently providing and offer a wide latitude to fund programs given sufficient resources.

Goals

The federal Office of Refugee Resettlement (ORR) requires all counties operating refugee employment service programs funded with TA and RESS funds to establish goals for and report outcomes on six performance measures.

The ORR has not set any minimum standards for performance, but it has said that its goal is to see continuous improvement in each of the measures each year. The State Refugee Programs Branch (RPB) also has not set any standards. Locally, the goals for these measures are included in the Refugee County Plan each year. The Plan must be approved by the San Francisco County Board of Supervisors and be certified by the State RPB.

The following table contains the State-approved FY 2002 goals and proposed FY 2003 goals. The goals are estimates based upon historical performance data and current economic conditions. Definitions for the measures are listed below the table. Although we would like to recommend raising our goals each year and would like to see continual improvement in performance, Staff believe that the prudent course during these worsening economic times is to leave the goals unchanged. A slight adjustment is suggested for cash aid reductions and terminations to more closely correspond with aid type [Refugee Cash Assistance (RCA)/TANF]. Historically, we have served a larger number of RCA cases as these clients are required to enroll in the refugee-funded programs, and when they obtain employment, usually have their aid terminated rather than reduced.

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: *411@picsf.org*

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
Telephone 415.431.8700 • Fax 415.431-8702
TDD 800.735.2929 (CRS)

	FY 2002	FY 2003
Employment Entry Rate	57%	57%
Cash Assistance Termination Rate	60%	67%
Cash Assistance Reduction Rate	40%	33%
Average Hourly Wage	$10.00	$10.00
Employment Retention Rate (90 days)	75%	75%
Entered Employment with Health Benefits Rate	75%	75%

Entered Employment (full/part time) is defined as "the entry of an active participant into unsubsidized employment for at least one day during the quarter." Full-time is 35 hours or more per week. The measure is calculated by dividing the number of refugees placed in jobs by the number enrolled.

Cash Assistance Terminations due to Earnings
The closing of a refugee recipient's cash assistance case – either TANF or Refugee Cash Assistance (RCA) or General Assistance (GA) – due to the refugee's earned income from employment. Calculated by dividing the number of refugees who have their cash assistance terminated by the number of refugees on cash assistance who were placed in jobs.

Cash Assistance Reductions due to Earnings
A reduction in the amount of a refugee's cash assistance due to earned income from employment. Calculated by dividing the number of refugees who have their cash assistance reduced by the number of refugees on cash assistance who were placed in jobs.

Employment Retention
Employed on the 90th day (after original job entry) at any unsubsidized job; a measure of continued participation in the labor market, not retention of a specific job.

Entered Employment with Health Benefits
A measure of how many jobs offer health benefits, either at placement or within six months of employment. Calculated as a percentage of full-time jobs.

Demographics/Population

The eligible population includes the five-year arrival data shown below from the RPB.

ARRIVALS OCTOBER 1997 – SEPTEMBER 2002

Country/Region of Origin	#	%
Former Soviet Union	1,206	55%
Bosnia/Eastern Europe	617	28%
Southeast Asia	210	10%
Middle East	75	4%
Africa	64	3%
Other	5	0%
Total	2,177	100%

Five-year service data from the Central Intake Point (CIP) are enclosed.

PIC Management Information Systems (MIS) reports show that of the 122 refugees and asylees enrolled in employment programs in the first nine months of this year, women and men were represented evenly at 50% each; 54% were age 34 to 54; 44% had been in the U.S. one year or less; 32% one to three years; and 24% over three years. 49% were college graduates in their former country. 57% were receiving cash assistance. For 89%, California was their initial State of resettlement.

Countries/regions of origin include 70 refugees/asylees (57%) from the Former Soviet Union; 28 (23%) from Asia (including China, Mongolia, Myanmar (Burma), Tibet, Japan, Indonesia, and Vietnam; 9 (7%) from Cuba, Central and South America (including Columbia, Peru, Brazil, Mexico, and Paraguay); 6 (5%) from the Middle East (Syria, Turkey, Israel, and Yemen), 6 (5%) from Africa (Ethiopia, Nigeria, Chad, and Rwanda) and 3 (3%) from Eastern Europe (Bosnia/Kosovo).

For comparison purposes, last year's 12 month employment programs' population included 56% female, 52% aged 34 to 54, 77% from the Former Soviet Union (FSU), 51% in the U.S. one year or less, 56% college graduates (in their country of origin), and 62% received cash assistance.

PROGRAM PERFORMANCE

The Workforce Investment San Francisco (WISF) Board adopted the following criteria for evaluating refugee formula-funded subcontractors' performance:

- The time period evaluated will include the prior fiscal year's program, which began October 1, 2001, and the first nine months of the current fiscal year, October 1, 2002 to June 30, 2003.
- The goals in the Refugee County Plan will be used as performance standards, and agencies that fail to meet these standards will be expected to provide an explanation in their quarterly narrative reports. (However, these goals only apply to employment programs; they do not apply to acculturation programs or to the CIP. The CIP has no numerical goals; acculturation programs only have a numerical goal for enrollments.)
- Changes in the job market should be taken into consideration; in a good year, we should expect more placements, in a recession, less.
- Specific measures are: Actual versus planned enrollments and placements and actual entered employment rate, retention rate, and percentage of jobs with health benefits for the FY 2001 program, and actual versus planned enrollment and placement data for the first nine months of this year.
- Agencies' quarterly narrative reports on their nine-month program performance should also be taken into consideration.

Attachments providing subcontractor performance statistics on the approved performance measures from October 1, 2001 through June 30, 2003 (some clients are still active) and 9-month program performance statistics for enrollments and placements from October 1, 2002 through June 30, 2003 are enclosed. Subcontractor quarterly narrative reports were also enclosed.

FY 2001 (October 1, 2001 through June 30, 2003)

Combined, the current employment programs exceeded the enrollment goal of 189, by enrolling 196 (104%); placed refugees and asylees in 123 of a planned 131 jobs (94%); and achieved a 47% employment rate with an average hourly wage of $11.75. Eighty-four percent of full-time jobs had health benefits, and 75% of the refugees placed were still working 90 days later. We exceeded the County Plan goals for average wage and jobs with health benefits, met the goal for job retention, but did not achieve the employment rate goal. Only Jewish Vocational Service's (JVS) Office Technology & Communication (OTC) program exceeded the 57% employment rate goal in the County Plan.

FY 2002 (October 1, 2002 through June 30, 2003)
Currently, the employment programs have enrolled 122 of a planned 127 (96%), placed refugees in 36 of a planned 60 jobs (60%) with an average hourly wage of $9.57.

FUNDING

The table below shows the estimated FY 2003 preliminary funding with a comparison of the FY 2002 preliminary, final, and current subcontractor funding with FFY 2001 carry forward funds added. PIC administration funding is not in this table. There is a **40% decrease** between current subcontractor services funding and what may be preliminarily available for programs and services starting October 1, 2003. (We experienced a similar **38% decrease** last year.)

	2002 Preliminary	2002 Final	2002 with carry forward	2003 Preliminary	2003 Final
TA	**$400,642**	**$404,832**	**$448,727**	**$291,004**	**?**
RESS	**$102,265**	**$104,973**	**$140,851**	**$61,200***	**?**
TOTAL	**$502,907**	**$509,805**	**$589,578**	**$352,204**	**?**

*estimate only

PROGRAM FUNDING RECOMMENDATIONS

PIC Staff initially formulated five funding scenarios, and discussed the five with the subcontractors. The Executive Committee recommends that the funding scenario on **Attachment 1** (blue) be considered for the Board's consideration. We considered the continued decrease in refugee arrivals, and tried to look into the future to determine how many refugees we should plan for this next year. Above all, we wanted to make sure that we will meet the needs of refugees and asylees, and give them as many choices as we can within the constrains of continued funding cuts.

This recommendation includes funding for all current subcontractors, gives increased emphasis to the more inexpensive employment services (ES) programs, gives greater percentage cuts to the acculturation programs which do not have employment goals, and merges the two vocational training (VT) programs. Merging the VT programs was done in lieu of entirely eliminating one of them, thus preserving customer choice. The Table on **Attachment 1** displays each of the programs arranged by activity to facilitate comparisons between them, and includes costs per person, preliminary funding amounts for FY 2002, current funding levels, and initial recommendations for FY 2003 funds. The service levels have been adjusted based on the dollar amount being recommended. The recommended placements are based on the planned program placement rates. The planned cost per person ($3,292) is lower than last year's initial planned cost per person served ($3,618).

We continue to try to streamline processes in order to make the refugee program system more efficient and effective, and lower the administrative load for both PIC and subcontractors' staffs.

Funds distribution per activity
The following chart shows FY 2002 initial funding distribution between the activities with a comparison of the FY 2003 recommendation.

Activity	FY 2002	FY 2003
CIP	15%	16%

ES	50%	59%
VT	22%	13%
A/SAS	9%	6%
Transp/Childcare	4%	6%

CIP	Central Intake Point
ES	Employment Services
VT	Vocational Training
A/SAS	Acculturation/Social Adjustment Services

RESS Funding Adjustment & FY 2002 Carry Forward Funds

The Executive Committee recommends that if there is only a slight variation (<$5,000) between estimated preliminary and final allocations, programs should absorb that increase or decrease across the board. If there turns out to be a substantial difference (>$5,000), staff will meet with all of the subcontractors and present revised recommendations at future Committee meetings in November or December.

Staff does not expect any substantial carry forward funds, but if there are any, it is recommended that priority be given to the supportive services pool. As it stands now, there are no funds for childcare, and the cost for a MUNI fast pass is increasing to $45. We will have to set limits on and priorities for transportation subsidies.

Staff will be available at your September 17th meeting. If you have questions prior to the meeting, please contact Wes Dixon at 923-4261 or wdixon@picsf.org.

Attachments

cc: Refugee Subcontractors, DHS, PIC Staff
Dan Crawford, CDSS/RPB

CIP Refugee Population

by Aidtype, Country of Origin, Age and SPL

where application date between 7/1/98 and 6/30/03

Country of Origin	TANF	RCA	OTHER	Total
Former Soviet Union	174	298	295	767
Bosnia/Eastern Europe	31	23	41	95
China/S.E.A.	26	75	31	132
Middle East	8	8	16	32
Cuba/Central Am.	1	14	10	25
Africa	1	20	41	62
Total	241	438	434	1113

Age Group	TANF	RCA	OTHER	Total
Age 21 and younger	0	57	41	98
Age 22 to 40	156	168	200	524
Age 41 to 49	64	55	105	224
Age 50 and older	21	158	88	267
Total	241	438	434	1113

SPL (Student Performance Level - Indicates English Proficiency)

	TANF	RCA	OTHER	Total
SPL 0	30	93	13	136
SPL 1	7	31	3	41
SPL 2	14	43	11	68
SPL 3	25	52	38	115
SPL 4	29	31	41	101
SPL 5	32	40	65	137
SPL 6	57	44	94	195
SPL 7	32	79	152	263
NoSPL	15	25	17	57
Total	241	438	434	1113

ATTACHMENT 2

REFUGEE EMPLOYMENT PROGRAM PERFORMANCE SUMMARY

OCTOBER 1, 2001 TO JUNE 30, 2003

AGENCY/ ACTIVITY	TOTAL SERVED			EMPLOYMENT ENTRY			EMPLOYMENT RATE (CO. PLAN = 57%*)			EMP.ENTRY WITH HEALTH BENEFIT (CO. PLAN = 75%**)			90 DAY EMP. RETENTION (CO. PLAN = 75%***)			HRLY. WAGE (CO. PLAN = $10)
	ACT	PLAN	%	ACT	PLAN	%	EMPLD	ENRD	%	H.B.	F/T PLCS	%	RET	PLCD	%	AVG.
REAP-ES	59	58	102%	36	38	95%	27	59	46%	16	17	94%	22	27	81%	$9.48
JVS-ES	89	80	111%	47	52	90%	37	89	42%	19	19	100%	26	37	70%	$12.61
TOTAL (ES)	**148**	**138**	**107%**	**83**	**90**	**92%**	**64**	**148**	**43%**	**35**	**36**	**97%**	**48**	**64**	**75%**	**$11.25**
JVS-VT-OTC	24	27	89%	27	22	123%	18	24	75%	10	17	59%	15	18	83%	$10.90
JVS-VT-IT/CAD	24	24	100%	13	19	68%	11	24	46%	7	9	78%	7	11	64%	$16.75
TOTAL (VT)	**48**	**51**	**94%**	**40**	**41**	**98%**	**29**	**48**	**60%**	**17**	**26**	**65%**	**22**	**29**	**76%**	**$12.80**
TOTAL (ALL)	**196**	**189**	**104%**	**123**	**131**	**94%**	**93**	**196**	**47%**	**52**	**62**	**84%**	**70**	**93**	**75%**	**$11.75**

*Employment Rate goal is 57% of refugees enrolled
**Health Benefits goal is 75% of full-time jobs
***Retention goal is 75% of refugees placed in a job.

ACTIVITY KEY:
ES - Employment Services
VT-OTC - Vocational Training-Office Technology & Comunication
VT - IT/CAD - Voc Trng - Information Technology/Computer Aided Drafting

SUBCONTRACTOR KEY:
REAP - Catholic Charities Refugee Employment Assistance Program
JVS - Jewish Vocational Service

ATTACHMENT 3

REFUGEE EMPLOYMENT PROGRAM PERFORMANCE SUMMARY

OCTOBER 1, 2002 TO JUNE 30, 2003

AGENCY/ ACTIVITY	TOTAL SERVED			EMPLOYMENT ENTRY				EMP.ENTRY WITH HEALTH BENEFIT			HOURLY WAGE
	ACT	PLAN	%	ACT	PLAN	%		H.B.	F/T PLCS	%	
REAP-ES	48	38	126%	13	20	65%		3	6	50%	$8.41
JVS-ES	54	64	84%	19	31	61%		8	7	114%	$9.67
TOTAL (ES)	**102**	**102**	**100%**	**32**	**51**	**63%**		**11**	**13**	**85%**	**$9.16**
JVS-VT/OTC	7	13	54%	2	4	50%		1	1	100%	$10.63
JVS-VT/IT-CAD	13	12	108%	2	5	40%		1	1	100%	$15.10
TOTAL (VT)	**20**	**25**	**80%**	**4**	**9**	**44%**		**2**	**2**	**100%**	**$12.86**
TOTAL ALL	**122**	**127**	**96%**	**36**	**60**	**60%**		**13**	**15**	**87%**	**$9.57**

KEY:
REAP - Catholic Charities Refugee Employment Assistance Program
JVS - Jewish Vocational Service
ES - Employment Services
VT-OTC - Vocational Training-Office Technology & Comunication
VT - IT/CAD - Vocational Training - Information Techology/Computer Aided Drafting

FY 2002 9 MO. PERFORMANCE SUMMARY
06/30/03

PRIVATE INDUSTRY COUNCIL STAFF FY 2003 PRELIMINARY REFUGEE FUNDING RECOMMENDATIONS

Agency	Activity	Cost per Person	Initial FY 2002 Funding	Current FFY 2002 Funding*	Initial FY 2003 Recom. Funding	TA	RESS	Recom.		Place. Rate
								Svc.	Plc.	
International Rescue Committee	CIP	$534	$75,050	$89,041	$57,159	$50,295	$6,864	NA	NA	NA
Catholic Charities CYO	ES	$1,850	$80,852	$111,000	$92,500	$92,500	$0	50	33	65%
Jewish Vocational Service	ES	$2,468	$172,577	$205,929	$113,945	$84,329	$29,616	47	31	65%
Jewish Vocational Service	VT-IT	$4,468	$54,675	$54,675	$44,680	$44,680	$0	10	8	80%
Jewish Vocational Service	VT-OTC	$4,408	$57,794	$57,794	$0	$0	$0	**		
International Institute of San Francisco	A/SAS	$295	$30,593	$30,593	$14,774	$0	$14,774	(50)		
Jewish Family & Children's Services	A/SAS	$165	$13,885	$13,885	$6,706	$0	$6,706	(41)		
Subtotal			$485,426	$562,917	$329,764	$271,804	$57,960	107	72	67%
Transportation/Childcare			$17,481	$26,661	$22,440	$19,200	$3,240			
Total		$3,292	$502,907	$589,578	$352,204	$291,004	$61,200			
PIC Administration			$88,748	$90,791	$62,153	$51,353	$10,800			
Grand Total			$591,655	$680,369	$414,357	$342,357	$72,000			

*Current FY 2002 funding includes carry forward FY 2001 funds.

** Office Technology & Communication (OTC) combined in above 10

CIP Central Intake Point - 16%
ES Employment Services - 59%
VT/IT/OTC Vocational Training/Information Technology/Office Tech & Communication - 13%
A/SAS Acculturation/Social Adjustment Services - 6%
Transportation - 6%

AGENCY TOTALS	
IRC	$57,159
JVS	$158,625
CC CYO	$92,500
IISF	$14,774
JFCS	$6,706

IRC - International Rescue Committee
JVS - Jewish Vocational Service
CC CYO - Catholic Charities - Catholic Youth Organization
IISF - International Institute of San Francisco
JFCS - Jewish Family & Children Services

9/10/2003

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** AUGUST 28, 2003

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDED DESIGN AND SELECTION CRITERIA FOR EVALUATING THE EFFECTIVENESS OF THE FIRST SOURCE HIRING PROGRAM DURING ITS FIRST FIVE YEARS OF OPERATION (AGENDA ITEM 6B)

ACTION REQUESTED

The WISF Board is asked to ratify the August 28th action of the Executive Committee to approve the design and selection criteria for an RFP for a contractor to conduct a program evaluation of the First Source Hiring Program.

BACKGROUND

The First Source Hiring Program, a local hiring program intended to increase employment opportunities for entry-level job seekers, was established by Administrative Code Chapter 83. One provision of that code was that the legislation would expire on the fifth anniversary of its effective date, which is September 20, 2003. The First Source Hiring Administration, which consists of the President of the Private Industry Council, the Directors of MOCD, DHS, SFRA and MOED and the Chancellor of City College, voted to reauthorize the program contingent upon a comprehensive evaluation of the program and recommendations to strengthen it. In order to allow sufficient time for a proper evaluation to be completed, the FSHA recommended that the Board of Supervisors extend the ordinance for one year.

PURPOSE OF THE SERVICES

The purpose of the contract is to secure professional services to comprehensively evaluate the effectiveness of the First Source Hiring Program and provide a written report, including recommendations, to the First Source Hiring Administration.

SERVICES TO BE PROVIDED

A. The Contractor will work with the First Source Hiring Administration and local program participants to develop process and outcome evaluation procedures, create and modify evaluation instruments and protocols, and organize data collection and reporting formats.

B. Contractor will review the current legislation, familiarize him/herself with the City's overall workforce development system, interview stakeholders and participants in the system and review similar legislation to identify best practices.

C. Contractor will gather information on the performance of the current program, including program overview, program budget and staff, outcome objectives, strengths and weaknesses of the program, needs and improvements to the program.

D. Contractor will attend meetings of the First Source Hiring Administration, the Workforce Development Advisory Committee and the Workforce Investment Board and committees as appropriate and relevant to the evaluation.

E. Contractor will conduct focus groups with stakeholders in order to obtain feedback regarding how the program has impacted them and how effectively the program has met their needs.

F. Contractor will prepare a written evaluation of the program's effectiveness, using the goals of the legislation, comparable programs within and outside the City and the information collected in the course of the program review and submit the written report to the First Source Hiring Administration.

FUNDING

Members of the FSHA have committed to seeking funding for these services from a variety of public and private sources and the award of this contract will be contingent upon the identification of the funding. Final approval to proceed with the contract will be required from the WIB Executive Committee after funding has been secured.

PROPOSED CRITERIA FOR EVALUATION AND SELECTION PROPOSALS

A. A thorough knowledge of workforce development systems and principles, preferably in San Francisco, including the role of community based organizations, organized labor, government agencies and the Private Industry Council

B. A demonstrated ability to carry out the proposed program including past performance and experience conducting program evaluations.

C. Submission of writing samples and professional references relevant to goals of this contract.

TIMELINE

The evaluation shall begin as soon as practical and be completed no later than April 1, 2004.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** AUGUST 28, 2003

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (AGENDA ITEM 6C)

The WISF Board is asked to ratify the August 28th action of the Executive Committee to approve the additions to the youth provider vendor's list.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco (WISF) Board, ratified the Youth Council's action and on December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002 the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001 without a due date.

DISCUSSION

RFQ is a process to identify and competitively select providers of specified services for individual referral at a quoted price. The use of an individual referral approach for securing youth services allows Youth Opportunity. San Francisco (YO! SF) staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process described above asked organizations to submit Statements of Qualifications. Each statement is reviewed and, if competitive and eligible to receive federal funds and provide the service(s) described, is recommended for placement on a vendors list.

Since June 27, 2002, additional potential vendors have submitted Statements of Qualifications.

RECOMMENDATION

Staff has reviewed all Statements of Qualifications submitted to the PIC, has determined the vendors to be eligible to receive WIA Youth Funds and the Executive Committee recommends the vendors listed on Table I be added to the youth vendors list.

Attachment

Table I
PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA) - YOUTH SERVICES
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
168	**Mission Neighborhood Centers** 534 Precita Ave San Francisco, CA 94110 (415)206-2113	**CASE MANAGEMENT PROGRAM,** a program designed to keep youth from re-offending, offers offending youth case management services, employment services and educational services. Case management services include case mgr. meeting with youth face-to-face once a week and monthly drop-in at the youth's school, workplace, or home. Case mgr., in addition will work with probation officers. Each youth will receive a minimum of 10 hours of case management services monthly. Employment services include youth being placed in various job opportunities at a wage of $8/hrly for up to 420 hours. Regular check-in will occur between case mgr and workplace supervisor. Educational services are required as part of the Case Management Program. Youth will be required to attend school or GED classes. Attendance will monitored closely. Assessment of educational needs will be done, then an Individual Service strategy will be developed.	$4,000	**YES**
169	**Horizons Unlimited of San Francisco, Inc.** 440 Potrero Avenue San Francisco CA 94110	**The Education Development and Employment Program,** offers job readiness training (20 hours), paid internship experiences (15 hours weekly), individualized job development, educational assessment and case management services. The dollar allotment requested will cover the stipend paid to the participant for the internship experience. Participants will paid $8/hrly for up to 260 hours. Horizons has a long history and solid relationships with our internship sites. Educational services include assistance in college applications, preparing for tests, and how to get financial aid. Case mgt services include in-house mental health services, arts, recreation and prevention services.	$2,300	**YES**
170	**Mission Language & Vocational School Inc.** 2929 19th Street San Francisco, CA 94110 (415)648-5220	**COMPUTER NETWORKING,** consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Students will receive basic skills training, followed by an occupational skills concentration. Students in the Computer Networking program will learn to design, build, and maintain computer networks in preparation for industry-standard certification through Cisco Academy courses, including UNIX, Data Cabling, JAVA, CCNA, and CNEP. Upon completion, participants will qualify for positions such as Network Technician Systems Analyst. A combination of lectures, on-line learning, and hands-on laboratory exercises allow students to apply what they learn in class to actual networks. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development./counseling, GED assistance, and 12-month follow-up are provided. The entry level positions for this field have a range of $8.50 to $15/hr.	$6,925	**YES**
171		**Professional Cooking-Intensive Course,** The curriculum consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Students will receive basic skills training followed by an occupational skills concentration. Students in the Latino Cuisine Culinary Academy receive hands-on training in traditional and contemporary world cuisines, with an emphasis on California and Latin American Cooking. The LCCA is designed as a gateway for students to achieve higher level positions in the hotel and restaurant industry. A 60-hour externship is required, and upon completion of the program a culinary training certificate is awarded. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development/counseling, GED assistance, and 12-month follow-up are provided. The entry level positions in this field have range of $8.50 to $15/hr.	$6,925	**YES**

Table I
PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA) - YOUTH SERVICES
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
172	**Mission Language & Vocational School Inc.** 2929 19th Street San Francisco, CA 94110 (415)648-5220	**Medical Assisting Program,** The curriculum consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Students will receive basic skills training followed by an occupational skills concentration. Students in the Medical Assisting program receive training for employment in doctor's offices and clinics, hospitals, and other health services organizations. Trainees receive practical experience in the health service industry and develop hands-on clinical administrative skills. The program concludes with certification in medical assisting and/or phlebotomy. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development/counseling, GED assistance, and 12-month follow-up are provided. Wages for all medical positions will average between $8.50 to $15/hr.	$6,925	**YES**
173		**Vocational ESL & Clerical Training I**, The curriculum consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Students will receive basic skills training followed by an occupational skills concentration. The Vocational ESL & Clerical Training I program covers office software and procedures, preparing students for a variety of entry-level positions. The program places strong emphasis on attaining VESL proficiency. Students are placed in one of three tracks based on their level of English ability, which are tailored for beginning, intermediate and advanced speakers. Participants are trained for a variety of positions such as Typist, Receptionist, Office Clerk, Secretary, Mailroom Clerk, Messenger, or Office Machine Operator. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development/counseling, GED assistance, and 12-month follow-up are provided. Wages for all clerical positions average between $8 to $13/hr.	$6,800	**YES**
174		**Computer Accounting Technician**, The curriculum consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Computerized Accounting teaches basic accounting language and practices in conjunction with VESL/Business English courses as needed, covering Microsoft Office software with an emphasis on Excel and spreadsheets in addition to business math, typing, filing, and 10-key calculator. Students then progress to QuickBooks and Peachtree software and advanced accounting practices, followed by a work externship. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development/counseling, GED assistance, and 12-month follow-up are provided. Hourly wages for accounting positions average between $8 to $13/hr.	$7,225	**YES**
175		**Clerical Job Skills Training,** The curriculum consists of a three-phase program over a maximum of eight six-week cycles or 48 weeks. Students will receive basic skills training followed by an occupational skills concentration. Students in the Clerical Skills component learn a complete range of modern office software, and are fully trained for a variety of entry-level office positions. In addition to software training, emphasis is placed on VESL proficiency and job-specific clerical skills. Students are evaluated on their performance in a simulated office work environment, and have the option of concluding the course with an internship at the school. Students learn job readiness skills to prepare them with the materials, knowledge, and behaviors they will need to successfully find employment in their field. Support services in the form of case management, one-on-one counseling, job development/counseling, GED assistance, and 12-month follow-up are provided. Wages for all clerical positions average between $8 to $10/hr.	$4,800	**YES**

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date:	Wednesday, November 19, 2003
Time:	9:30 a.m. – 11:30 a.m.
Location:	SBC Conference Center 370 Third Street San Francisco, CA 94107

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at http://www.sfgov.org/bdsupvrs/sunshine.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

♿ If you require special accommodation due to a disability, please call Roberta Fazande at 415-923-4265 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

Issued: Wednesday, November 12, 2003

AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, NOVEMBER 19, 2003

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the September 17, 2003 meeting *(Action Item)**
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentations**
   - A. "Quarterly Briefing: San Francisco's Labor Market" by Kevin Stange
   - B. "The Economic Impact of San Francisco Small Business" by Scott Hauge
   - C. "Next Steps" by Pamela Calloway
5. Consent Calendar *(Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

   - A. Proposed Action: Approval of 2004 WISF Board Meeting Schedule

6. Committee Reports (Information Item)**
   - A. Finance Subcommittee
   - B. Employer Services Committee
     - Employers Forum Report
   - C. One Stop Operations and Services Committee
   - D. Program Resources Committee
   - E. Youth Council
     - Retreat Report
7. President's Report (Discussion Item)
8. Chair's Report (Discussion Item)
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Agenda Items (Discussion Item)
11. Adjournment *(Action Item)*

*Information enclosed.

** Information to be posted on the www.picsf.org website. If hard copies are needed, please contact Alice Chiu at (415) 923-4003.

Workforce Investment San Francisco Board 2004 Proposed Meeting Dates

Wednesday, January 21, 2004

9:30 a.m. – 11:30 a.m.

Location TBD

Wednesday, February 18, 2004

9:30 a.m. – 11:30 a.m.

(Meeting to be held only if swearing-in ceremony needed)

Wednesday, March 10, 2003

9:30 a.m. – 11:30 a.m.

Location TBD

Wednesday, June 16, 2004

9:30 a.m. – 11:30 a.m.

Yerba Buena Center for the Arts
701 Mission Street, Forum

Wednesday, October 20, 2004

9:30 a.m. – 11:30 a.m.

Location TBD

Wednesday, December 22, 2004

9:30 a.m. – 11:30 a.m.

Location TBD

6088

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